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PRESENTER'S GUIDE

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PAD: RECORD TRACKING

COMPOSITE HEALTH CARE SYSTEM

Submitted in Response to
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For:

U.S. Army Information System Section & Acquisition Agency and Defense Medical Information Management

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LIST OF EFFECTIVE PAGES

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- This document includes the specific pages cited below.
- The "Date" column indicates the date carried in the header of the subject page, thereby identifying the current issue of each page in this document.
- If change pages are issued, insert as specified in the change notice. Dispose of superseded pages in accordance with applicable regulations.

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RECORD OF CHANGE

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Presenter's Guide Overview

I. THE CHCS TRAINING SYSTEM

The CHCS Training System is composed of training documentation and the Training Database, which are designed to support classroom training for the presenter and students. For more complete class information, refer to the CHCS Class Descriptions, TC-[4]-0720[1] and TC-4-0729[2].

The training documentation and Training Database are the basic tools for conducting CHCS training; however, you are the key to making the training sessions successful learning experiences for the students. Refer to the Facility Trainer Preparation class (Lesson 1: Teaching/Learning Strategies) for detailed information on presentation skills.

The following documents are used to teach this class:

- Presenter's Guide
- Student Guide
- Subsystem-Specific Reference Manual

The Training Database, also referred to as the Training Software, is designed to support directed training in conjunction with the Presenter's and Student Guides. The Training Database includes pre-positioned (previously entered) data that supports the specific CHCS functionality presented in these training materials. The Training Database contains all of the application software the students will use at their workcenters, and pre-positioned data to support all CHCS classes.

Because the pre-positioned data supports only the documented classes, the Training Database cannot be used for free practice or for demonstrations other than those outlined in the Presenter's Guides. Refer to the Facility Trainer Preparation class (Lesson 7: The Training Database) for more detailed information on the structure and refresh capability of the Training Database.

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[1] The middle digits change according to the CHCS software version.

[2] Subject to revision.

II. TRAINING DOCUMENTATION OVERVIEW

The training documentation for this CHCS class is composed of three different manuals: the Presenter's Guide, the Student Guide, and a subsystem-specific Reference Manual.

PRESENTER'S GUIDE

The Presenter's Guide provides the lesson plans, class preparatory activities, and demonstration outlines you will need to present the specific CHCS class. It also contains copies of the Practices, the Master Practice, Evaluation Criteria, and the data cards for use with the Training Database. Graphics (figures) are provided as appropriate to support your class presentation.

The Presenter's Guide contains the following sections:

Presenter's Guide Overview

This section contains an overview of the CHCS training system; class-specific information; checklists of presenter activities before, during, and after class; and commonly asked questions. It lists two types of questions relating to the class presentation:

Site-Specific Questions

These are questions you will need to ask at every location where you teach this class, whether a site or regional training center. They generally deal with workflow procedures. Management representatives of the target audience can provide answers for site-specific issues. These answers may affect how the class materials are customized for use at the site.

Other Questions Students Might Ask

These are questions that students may generate during classroom training. Answers are provided for this type of question.

Modules

Each module is in its own stand-alone division. Each module contains the following sections:

Section 1. Module Outline

I. Introduction

This subsection outlines purpose, specifications, and objectives.

II. Expanded Presentation

This subsection contains detailed directions and explanations regarding the topics and activities covered in the class.

III. Brief Presentation

This subsection contains a skeletal version of the Expanded Presentation. Detailed information is left out, and only the presentation steps are listed. This version of the presentation, edited slightly, becomes the Presentation for the Student Guide. You may choose to use this subsection for presenting the class once you become familiar with it.

IV. Closure

This subsection discusses what the students have learned and how it fits with other training.

Section 2. Practices

The practices include scenarios similar to those used in the presentation. In some classes, the scenarios are specific to a particular student group (e.g., target audience). Evaluation Criteria are provided.

Section 3. Master Practice

The Master Practice is a cumulative activity for the students that addresses the objectives covered. You will evaluate the students' skill levels based upon their ability to complete this practice, using the Evaluation Criteria provided.

Section 4. Data Cards

The data cards are used with the Training Database. They contain the data that should be entered to support the Presentation, Practices, and Master Practice. Data cards are provided for the presenter and 10 students. For some classes, there is enough pre-positioned data for two sessions of a class to be conducted concurrently, and the data cards are marked accordingly.

Section 5. Reference Materials

This section contains class-specific supporting materials, such as output samples, sample reports, keyboard templates, Medication Instruction List for writing prescriptions, Procedure Flowcharts, and Quick Reference Guides. If certain functionalities use information or perform calculations supported by scientific literature, references to the literature are included herein.

Section 6. Transparencies

This section contains transparency masters of figures and tables. The students do not receive this section.

Appendix A. Class Evaluation Forms

This appendix contains evaluation forms to be completed at the end of every CHCS class. Refer to the Facility Trainer Preparation class (Lesson 5) for detailed explanations of each form and instructions on how to distribute the forms. Briefly, the Class Evaluation Forms are as follows:

Class Critique

Students use this form to evaluate the class.

Student Attendance and Performance Summary

Use this form to document student attendance and level of achievement in reference to the Master Practice.

STUDENT GUIDE

The Student Guide is provided for classroom use. At the discretion of the site, the guides may be retained by the student when the class is over, or the guides may need to remain in the classroom for use by other sessions of the same class. Additional materials may be available to support the class presentation. These materials will often be a benefit to them at their workcenters. Some of the materials will be reproduced and provided as handouts.

The Student Guide contains the following sections:

Student Guide Overview

This section contains an overview of the Student Guide, class specifications, and conventions used in the documentation.

Modules

Each module is in its own stand-alone division. Each module contains the following sections:

Section 1. Module Outline

Slightly edited, this section is the same as in the Presenter's Guide. It contains the presentation objectives, topics, activities, and steps.

Section 2. Practices

These are the same practices that appear in the Presenter's Guide; however, the Evaluation Criteria are not included in the Student Guide.

Section 3. Master Practice

This is the same Master Practice that appears in the Presenter's Guide; however, the Evaluation Criteria are not included in the Student Guide.

Section 4. Data Cards

This section contains all of the same data cards that appear in the Presenter's Guide.

Section 5. Reference Materials

This section contains all of the Reference Materials that appear in the Presenter's Guide.

In addition to the Student Guide, students should be provided with a handout containing class-specific Quick Reference Guides extracted from the Reference Materials.

SUBSYSTEM REFERENCE MANUAL

The Subsystem Reference Manual is designed to support and augment classroom training. Both the Presenter's Guide and the Student Guide are dependent upon use of the Reference Manual. Copies of this manual should be available to all students for use during classroom training. There will be additional copies available at the workcenters for the students to use when they begin using CHCS on the job.

The Reference Manual contains the following sections:

Section 1. Subsystem Overview

Section 2. Menu Diagrams & Definitions

This section contains menu diagrams for the entire subsystem, and definitions of every menu option in the diagrams.

The first part of this section is the Option Finder, where every menu option in the subsystem is listed alphabetically by option name (not synonym). The page number where the option definition is found is listed at the right margin, opposite the option name.

A diagram of the main subsystem menu immediately follows the Option Finder. Beginning on the page following this diagram, options on the main subsystem menu are briefly defined in the order they appear on the menu.

Options on the main subsystem menu that lead to additional menus are also diagrammed to show all menu layers. On a separate page, associated option definitions immediately follow each main option diagram, also in the order they appear on the successive menus.

Section 3. Procedure Flowcharts

Flowcharts are a visual representation of the steps required to complete a procedure.

Section 4. Quick Reference Guides

This section contains "at a glance" information, including option or action definitions, screen displays, entry path, and other "need to know" information, for commonly used options and actions. Most of the guides are specific to the subsystem; however, some of the guides in each Reference Manual apply to all subsystems. The titles of these common Quick Reference Guides all begin with "CHCS."

The guides are displayed sideways on the paper so that the sites can have the guides bound into a pocket-size quick reference for users.

Section 5. Subsystem Glossary

This section contains CHCS and subsystem terminology and definitions. The terms are arranged alphabetically for easy reference.

Section 6. Sample Output Reports

This section contains sample copies of subsystem reports. You may want to refer students to this section during class as you discuss the various reports available.

III. CLASS SPECIFICATIONS

PAD: Record Tracking

DOCUMENT NUMBERS:	TC-4.4-0320/TC-4.4-0321
OVERVIEW:	The purpose of this class is to demonstrate the software options which allow supervisors and selected medical record room personnel to establish and maintain medical records at medical treatment facilities (MTFs). This class is presented in modular format to target different audiences.
CLASS LENGTH:	8 hours
PREREQUISITES:	ORT: CHCS Orientation Module 1 - Getting Started Module 3 - MailMan PAD: Registration Functions
RECOMMENDED CLASSES:	None

Module 1 - Basic File Room Functions

Module Overview:	This module provides students with an overview of the basic file room functions.
Module Length:	4 hours
Target Audience:	PAD File Room Staff and Supervisors
Objectives:	- Create an outpatient record for a registered patient. Practiced in Practice 1 - Create a new volume for an existing outpatient record. Practiced in Practice 1 - Print a label for an existing outpatient record. Practice 1 - Check-out a record at the same time it is created. Practiced in Practice 2 - Inquire about a patient record. Practiced in Practice 2

PAD: Record Tracking (continued)

Module 1 (continued)

- Charge-out a record.
  Practiced in Practice 2
- Flag a record as Missing.
  Practiced in Practice 2
- Check-in a record.
  Practiced in Practice 2
- Remove a Missing flag as records are checked-out to a patient.
  Practice 2
- Create a Batch List.
  Practiced in Practice 3
- Print Batch List entries.
  Practiced in Practice 3
- Delete entries from the Batch List.
  Practiced in Practice 3
- Create records from a Batch List.
  Practice 3
- Print a Pull List.
  Practiced in Practice 4
- Charge-out a Pull List.
  Practice 4

Module 2 - Basic Inpatient MRT Functions

Module Overview: This module provides students with practice charging and recharging inpatient records.

Module Length: 2 hours

Target Audience: PAD File Room Staff and Supervisors
Site-Selected Personnel who track inpatient records

Objectives:

- Reprint an MRT label for an inpatient record.
  Practiced in Practice 1
- Check-in an inpatient record.
  Practiced in Practice 1
- Recharge an inpatient record.
  Practice 1
- Flag an inpatient record as Missing during recharge.
  Practiced in Practice 2
- Remove flag as Missing during recharge.
  Practiced in Practice 2

PAD: Record Tracking (continued)

Module 2 (continued)

- Charge-out an inpatient record.
  Practice 2
- Trace patient records.
  No practice
- Create and charge-out an Ad Hoc Pull List.
  No practice

Prerequisites: PAD: Record Tracking
Module 1 - Basic Record Room Functions

Module 3 - Advanced File Room Functions

Module Overview: This module provides students with an overview of advanced file room functions.

Module Length: 2 hours

Target Audience: Site-Selected Personnel who track inpatient and/or outpatient records

Objectives:

- Inactivate a record.
  Practiced in Practice 1
- Display a record's movement history.
  Practiced in Practice 1
- Delete a record.
  Practice 1
- Remove a Not Fillable designation.
  No practice
- Create a Record Transfer/Retire List.
  No practice
- Generate a record tracking management report.
  Practice 2

Prerequisites: PAD: Record Tracking
Module 1 - Basic Record Room Functions

CLASS PRESENTATION OVERVIEW

The PAD: Record Tracking class is designed for Medical Record Tracking File Room personnel who track the movement of patient files. These training materials have been designed to reflect the workflow and activities of the Medical Record Tracking File Room(s) of a military hospital.

The class is designed to address both the basic file room functions associated with lending and retrieving of records, and the advanced file room functions associated with supervisory activities. As such, the basic functions portion of the class is addressed in the first set of objectives.

Sequence of this class is very important. Many activities are based on the successful completion of previous objectives and/or exercises. For example, after a record is created, that record will later be checked-in and checked-out. In addition, Pull Products processing requires a careful sequence of tasks for the options to work effectively.

Students may log on using the appropriate access and verify codes and follow along with all presenter demonstrations; however, this is not mandatory. There are two points at which the students gather around one terminal as the class is introduced and the Record Tracking Menu options are discussed.

Allow a 10-minute break after approximately every 50 minutes of class time.

Ask students to complete and turn in the Class Critique along with the Master Practice when their requirements for the class have been met (e.g., at the end of a module).

Remember to check the Class Presentation Checklist for items applicable to all CHCS training classes.

CLASSROOM TRAINING MATERIALS

The following materials are specific to the presentation of this class:

– PAD: Record Tracking Presenter’s Guide

– PAD: Record Tracking Student Guide

– Patient Administration Reference Manual

Refer to the Preclass Checklist for equipment and supporting materials that may be needed.

IV. CONVENTIONS

GENERIC CONVENTIONS

■ designates objectives. The activities following the solid box support that objective.

❑ designates subobjectives. The activities following the open box support that subobjective.

ALL CAPS AND BOLD text at the left margin indicates a topic. A topic appears within the text of an objective or subobjective and can include information that is independent or supportive of an objective or subobjective.

Initial Caps and Bold text at the left margin indicates a level 1 subtopic. A level 1 subtopic appears within the text of a topic. It includes information that is supportive of the topic.

> **Initial Caps and Bold** text at one indent indicates a level 2 subtopic. A level 2 subtopic appears within the text of a level 1 subtopic and includes information that is supportive of the level 1 subtopic.

>> **Initial Caps and Bold** text at two indents indicates a level 3 subtopic. A level 3 subtopic appears within the text of a level 2 subtopic and includes information that is supportive of the level 2 subtopic.

▲ designates a procedure. Numbered steps following the solid triangle support that procedure.

Bullets (•) with an action verb indicate activity steps.

Following a prompt, text in **ALL CAPS AND BOLD** indicates specific data to be entered (typed or selected from the screen) by the student. This specific (or constant) data is usually the same for all students or for the activity.

Variable data is represented by **[text in square brackets]**. Variable data can be data provided on the appropriate data card, or it can be data that you choose to support the scenario. This variable data is different for each student.

The complete menu path is always included each time a menu option is accessed, starting at the subsystem primary menu. The synonym for the menu where the last objective or activity ended is listed in **bold**. If the last activity was a practice, the lowest menu common to both the practice and the current objective is listed in **bold**.

Primary Menu → ME → IOP

Scenarios appear in italics for easy recognition.

V. CLASS CHECKLISTS

PRECLASS CHECKLIST

_______ Determine the target audience and associated specialties.

_______ Review modules. Note that the modules are broken into six sections: Module Outline, Practices, Master Practice, Data Cards, Reference Materials, and Transparencies.

_______ Review Subsection VI of the Presenter's Guide Overview (Commonly Asked Questions) for site issues and questions commonly asked by students.

_______ Contact the management representatives of the target audience to determine how they plan to incorporate CHCS into the workflow for each of the specialty areas.

_______ Customize the class presentation to be site- or specialty-specific. Be prepared to discuss the manner in which the site has chosen to deal with a particular activity.

_______ Reproduce graphics to use in class as viewgraphs, as appropriate.

_______ Reproduce the Quick Reference Guides from Section 5 for all students attending this class.

_______ Reproduce the Class Critique (see Appendix A) for distribution after completion of the Master Practice.

_______ Determine Area, Username, and the availability of Training Database and class-specific data.

_______ Determine if the following equipment is available and functioning properly:

- Overhead Projector
- VT Series Terminal (for the presenter)
- VT Series Terminals (one for each student)
- LA Series Companion Printer(s)
- Electrohome Projection Monitor or LCD Display Tablet
- Other ________________________________

PRECLASS CHECKLIST (continued)

_______ Check the site policy on whether students are allowed to retain their Student Guides. If not, duplicate the paper-and-pencil tests as handouts or instruct the students to write their answers on the blank paper provided.

_______ Determine that the following training materials are available for use:

- Presenter's Guide
- Student Guides (one copy per training station)
- Subsystem Reference Manual (one copy per training station)
- Quick Reference Guide handout
- Additional reference materials (as applicable)
- Pens/Pencils
- Blank paper (as applicable for note-taking or practices)
- Chalk/Greaseboard (whiteboard) pens
- Other ____________________________________

_______ Place the following at each student's terminal:

- Student Guides
- Subsystem Reference Manual
- Quick Reference Guide handout
- Additional reference materials (as applicable)
- Class Critique
- Other ____________________________________

CLASS PRESENTATION CHECKLIST

_______ At the beginning of the class, show the students how to use the Student Guide and Subsystem Reference Manual. Encourage them to use the materials during class.

_______ Encourage students to take notes. Inform students that blank paper is available, or they may write on their Quick Reference Guide handout.

_______ Remind students about secondary menu options (covered in ORT: CHCS Orientation).

_______ Have students log on when indicated in the Module Outline.

_______ Remind students of the preferred method for accessing patient records at Select Patient prompts. Explain that, due to restrictions of the Training Database, during training they may be required to use patient name instead.

_______ During class, refer students to the appropriate sections of the Reference Manual as indicated in the Module Outline.

_______ Direct students to perform scenario-based practices at the appropriate times noted in the Module Outline. Note that some classes offer different practice scenarios that address specific specialty areas.

_______ Remember to allow students to take a 10-minute break for every 50 minutes of class time.

POSTCLASS CHECKLIST

_______ Direct students to complete the Master Practice.

_______ Direct students to complete the Class Critique.

_______ Distribute additional handouts, as applicable.

_______ Remind students to take the Quick Reference Guide handout with them and any additional reference materials distributed at the beginning of the class.

_______ Inform students that the copy of the Reference Manual remains in the classroom, and that another copy of the Reference Manual will be located at the workcenter for extended help or information after training is completed.

_______ Remind students to use the Online Users Manual as needed at their workcenter.

_______ Give the attendance roster and all samples of student performance to the Facility Training Coordinator when the class is over.

VI. COMMONLY ASKED QUESTIONS

The following is a list of issues that might affect the way students use CHCS. Once it is determined how students will deal with specific activities, the training materials can be customized to reflect these issues.

SITE-SPECIFIC QUESTIONS:

- Are all record room personnel assigned supervisory tasks, as well as those tasks associated with lending and retrieving patient records?

  ***Answer*:** If so, all file room staff will complete the entire class.

- Has the file room staff previously used a computer-based Record Tracking System?
- Do they support the Tri-Service System?
- What types of medical records are tracked?

  ***Answer*:** Inpatient, outpatient, dental.

- If they track inpatient records, what procedures are set up for tracking?
- How are the records referred to? Medical or Health?
- How far in advance of scheduled appointments are the Charge Cards printed?
- Are Charge Cards (Pull Products) sorted by alphabetic or terminal digits?
- Who at the facility is responsible for maintaining the Record Tracking System?

  ***Answer*:** If the system is maintained by file room supervisors, describe the Reference Manual sections applicable to the System Definition Menu options. These are fully discussed at the end of Module 3 - Advanced Record Room Functions.

- Are barcode printers and readers available in each record room?
- How is the site going to coordinate the use of the record tracking software and the inpatient delinquent record tracking application?

- Will removal of a Missing record flag require verification by a supervisor?

  Answer**:** If so, use the optional statement at the end of the Flag a Record as Missing activity.

- Does the site refer to outpatient records as Medical Health Records?

- Does the site store the inpatient/outpatient records in the same physical room?

OTHER QUESTIONS STUDENTS MIGHT ASK:

- How does Record Tracking differ from existing Pull Products?

  Answer**:** The system actually tracks the medical record. In addition, this software will automatically create records.

- Is the Record Tracking software connected with delinquent record tracking?

  Answer**:** No, they are separate software applications.

PAD:
RECORD TRACKING

Module 1 -
Basic Record Room Functions

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Section 1. Module Outline

I. INTRODUCTION

OVERVIEW OF RECORD TRACKING

Welcome to the class on Medical Record Tracking.

The purpose of this class is to demonstrate the software options which allow supervisors and selected medical record room personnel to establish and maintain medical records at medical treatment facilities (MTFs).

The entire class will last approximately 8 hours and is divided into three modules. The approximate time allotted for each of the three modules is as follows:

Module 1 - 4 hours

Module 2 - 2 hours

Module 3 - 2 hours

The target audience varies by module.

Prerequisites include:

– ORT: CHCS Orientation
  Module 1 - Getting Started
  Module 3 - MailMan

– PAD: Registration Functions

There are no recommended classes.

Note: Refer to the Class Specifications for a more complete description of all modules.

Practices will follow the demonstration or lecture. A Master Practice will be given at the end of each module to demonstrate proficiency in the objectives presented.

OVERVIEW OF MODULE

The purpose of this module is to cover those activities and processes associated with basic file room responsibilities, such as creating and charging-out records and processing Pull Lists.

This module is scheduled to last approximately 4 hours.

The target audience is PAD File Room Staff and Supervisors.

The activities for this module will include a demonstration of procedures for Record Tracking.

The classroom activities have been planned to reflect activities and workflow, using the Composite Health Care System (CHCS).

DISCUSS OBJECTIVES

– Create an outpatient record for a registered patient.

– Create a new volume for an existing outpatient record.

– Print a label for an existing outpatient record.

– Check-out a record at the same time it is created.

– Inquire about a patient record.

– Charge-out a record.

– Flag a record as Missing.

– Check-in a record.

– Remove a Missing flag as records are checked-out to a patient.

– Create a Batch List.

– Print Batch List entries.

– Delete entries from the Batch List.

– Create records from a Batch List.

– Print a Pull List.

– Charge-out a Pull List.

II. EXPANDED PRESENTATION

INTRODUCE THE PATIENT ADMINISTRATION (PAD) SYSTEM MENU

- Log on to CHCS and access the PAD System Menu.

The PAD System Menu is the primary menu for patient administration-related functions using CHCS.

INTRODUCE THE PATIENT ADMINISTRATION REFERENCE MANUAL

A reference manual is available at each terminal for use in the classroom.

– The manual is also available at your workcenter.

– All menu definitions are contained in the manual.

- Refer to the Patient Administration Reference Manual for applicable menu diagrams and definitions and procedural flowcharts.
- Enter **???** (to access the menu option descriptions online).
- Press **<Return>** to access remainder of help text or press **<^>** to exit the help listing.

■ CREATE AN OUTPATIENT RECORD FOR A REGISTERED PATIENT

Scenario: *A patient has recently been transferred to the base serviced by your clinic. He is under continuing care for a recent auto accident. He has been registered in CHCS and has brought his records from the previous treatment facility. You need to create his outpatient record and print the labels.*

OVERVIEW OF THE MEDICAL RECORD TRACKING SYSTEM

The purpose of the CHCS Record Tracking System is to electronically track patient records, medical or dental, their location and availability to be charged out.

The system is specifically designed to track the location of a record and its availability to be charged out.

The tracking is achieved through the creation of an electronic record and printed labels that identify records by patient name or identification number (ID#).

These labels are human- and machine-readable through barcodes.

Medical record tracking (MRT) functions provide:

– Loan control.

– Record transfer and retirement.

– Data and statistics necessary for record management.

The system allows you to:

– Create records and print labels, both automatically and manually.

– Generate Pull Lists.

– Check-in and charge-out records.

– Track individual record statuses, locations, and pending requests.

– Flag records that are missing, or are inactivated for various reasons.

– Generate lists of those records eligible for transfer and/or retirement.

– Generate the reports necessary to manage department activities.

– Generate electronic messages to notify tracking system users of information concerning specific patient records.

The CHCS Record Tracking system is designed to integrate many functions in the Patient Administration (PAD), Patient Appointment and Scheduling (PAS), and Radiology (RAD) Subsystems.

It responds to a series of triggers generated by any or all of those subsystems.

Creation of Records

Records for tracking patient medical records may be created when:

– A patient is registered through PAD registration options.

– A patient is admitted to the hospital. Inpatient records are created automatically when a patient is admitted to the facility.

– An appointment is scheduled for a registered patient who does not have a record in the MRT system.

– Batch List and Pull List entries are available to be initialized when a patient appointment is scheduled.

System-Generated Messages or Entries

– Record request notices are generated when patients check-in for unscheduled appointments.

– Mail messages are generated when patient records are identified as missing, found or deleted. This is an optional feature on the system.

– An entry is generated on the pending request list when a requested record is currently charged out.

– Entries are generated on the overdue list when the current borrower has not returned a record within an MTF-specified time.

The creation of records and record labels is a function of the CHCS Record Tracking System.

An MRT record consists of the following:

– Patient identifier – name or family member prefix (FMP)/Social Security number (SSN)

– Record type

– Volume number

– Record number

– Current location

– Home location

– Status.

CHCS has two record tracking applications:

– Patient Administration Medical Record Tracking

– Radiology Image Tracking.

Data that supports these applications defines the file rooms, record types, and the parameters under which record tracking applications are operated, such as the number of days after which a borrowed record is tagged as overdue.

- Refer to Reference Manual, Procedure Flow Charts: Record Creation, and review process.

- Access the Medical Records Menu (MRM) option on the PAD System Menu.

PAD System Menu ➔ MRM

- Confirm Medical Records File Room as the file room location: **<Return>**

Explain:

The system displays the default record room name for the users' division. The default is usually the largest file room. You may accept the default or type in your own file room. Access to filerooms is determined by assigned security keys.

A different record room associated with the location may be entered.

If a default record room is not defined in the system parameters, a file room entry is required.

Enter ?? (to display a picklist of the other file room names for their division).

You will be working out of that file room electronically when you confirm the default or enter a new file room.

- Accept the file room's default devices: **<Return>**

Describe Each Option on the Medical Records Menu

- Access the Transaction Menu (TM) option on the Medical Records Menu.

  PAD System Menu → **MRM** → TM

  Explain:

  The Transaction Menu options are used for most file room functions.

  Functions such as creating records and charging out records are performed automatically when options on the Pull List Functions Menu are accessed.

- Refer to Reference Manual, Menu Diagrams & Definitions: Transaction Menu, and review the functions performed when each menu option is used.
- Return to the Medical Records Menu.
- Access the Pull List Functions Menu (PL) option on the Medical Records Menu.

  PAD System Menu → **MRM** → PL

  Explain:

  The Pull List Functions Menu option allows you to create multiple records from clinic appointments which are needed for the same date and time by the same borrower.

> **NOTE TO PRESENTER**: Define borrower as any hospital location, provider, or other entity specified by the MTF as eligible to request and borrow patient records.

  You create pull lists in two ways.

  – Clinic Pull Lists are created automatically by the system as appointments are made through scheduling options.

  – Ad Hoc Pull Lists are created using the Create a Pull List option on an as-needed basis, such as for tumor registry or peer review.

- Refer to the Designate Requests as Not Fillable option.

  Explain:

  If records are not physically present in the file, they may be designated as Not Fillable when the Charge-Out Pull List Records option is used.

  All other options displayed on this menu are related to Pull List activities.

- Refer to Reference Manual, Menu Diagrams & Definitions: Pull List Functions Menu, and review the functions performed when each menu option is used.

- Access the Batch Record Creation Menu (BR) option on the Pull List Functions Menu.

  PAD System Menu → MRM → **PL** → BR

  Explain:

  The Batch Record Functions Menu option is designed to automatically create pull lists from clinic appointments.

  The option allows you to create two different lists:

  – a 'pull list' which contains patients who already have electronic records.

  – a 'batch list' which contains patients who do not have electronic records yet.

- Refer to Reference Manual, Menu Diagrams & Definitions: Batch Record Creation Menu, and review the functions performed when each menu option is used.

- Return to the Medical Records Menu.

- Access the Request Record Menu (RR) option on the Medical Records Menu.

  PAD System Menu → **MRM** → RR

  Explain:

  The Request Record Menu option allows records to be requested individually when no appointment is scheduled, such as for special physician review.

  This menu option also interfaces with PAS scheduling and with the Pull List Functions Menu, allowing you to edit, cancel, and fill requested records.

  Emphasize that this is designed to cut down on phone calls to the file room when a special request is required.

  Point out the Designate Requests as Not Fillable option.

  Remember that this option can also be accessed from the Pull List Functions Menu.

- Refer to Reference Manual, Menu Diagrams & Definitions: Request Record Menu, and review the functions performed when each menu option is used.

- Return to the Medical Records Menu.

- Access the Record Information Menu (IN) option on the Medical Records Menu.

  PAD System Menu ➔ **MRM** ➔ IN

  Explain that the Record Information Menu option allows you to generate reports that provide information concerning records of specified patients.

- Refer to Reference Manual, Menu Diagrams & Definitions: Record Information Menu, and review the functions performed when each menu option is used.

- Return to the Medical Records Menu.

- Access the Management Reports Menu (MA) option on the Medical Records Menu.

  PAD System Menu ➔ **MRM** ➔ MA

  Explain:

  The Management Reports Menu option is designed to generate reports that provide information to analyze workload and to identify record control problems.

  Options on this menu interact with data entered on other options to provide greater control over records.

- Refer to Reference Manual, Procedure Flowcharts: Generating Management Report Entries, and review the information.

  Explain that if you have a record for which a loose filing exists, is overdue, and for which there is a pending request, the record will appear on the Loose Filing Report, the Overdue Records List, and the Pending Request List.

- Refer to Reference Manual, Menu Diagrams & Definitions: Management Reports Menu, and review the functions performed when each menu option is used.

- Return to the Medical Records Menu.

- Access the Create a Label/Record/Volume (CV) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM → CV

- Refer to Quick Reference Guide: Create a Record.

  Explain:

  When a record is created, the system assigns a record number, and enters the default record room for the home location and the current borrower.

  Labels can then be printed identifying a patient's record type and number, and additional data associated with the patient's record.

  Labels are printed with a barcode.

  PAD registration allows you to create an outpatient record, and print a label, if set in the PAD parameters.

  Inpatient records are created automatically when a patient is admitted to the facility.

- Select Patient: **P0060** (PARR,ALLAN)

  Explain:

  The Select Patient Name prompt requires you to enter a patient identifier.

  The patient identifier is the first initial of the patient’s last name and the last four digits of the sponsor’s SSN.

  Record tracking prompts are site-definable and prompts seen in this class may vary slightly from what users see at the workcenter.

- Enter at Choose 1-3: **1**

  Point out the message indicating no Medical Records Tracking record on file.

- Press **<Return>** (to continue).

- Indicate that you wish to create a new record or volume: **Y**

- Enter new record type: **O**(UTPATIENT)

  Point out fields on the RT New Record Ask screen that indicate the patient name, the record type, and the volume number.

  Explain:

  Borrowers may be hospital divisions, clinics or wards, and personnel associated with the application.

  You can now complete the RT New Record Ask screen.

- Visually verify the information on the RT New Record Ask screen:

  Home Location: [default record room]

  Current Location: [default record room]

    Explain that the system automatically enters the default record room into these two fields, if set in the system parameters.

  Enter Associated Borrower:

    Explain:

    An associated borrower can be entered for additional information.

    For example, if a physician is entered as the borrower, users can enter which clinic is involved.

    This is useful when records are requested by certain personnel at specific borrower clinics/locations.

  Enter Content Descriptor:

    Explain that this is a free-text field of 20 characters which may be used for any additional information you would like to enter on the record.

- If data is acceptable as is, press **<Next Screen>** (to display the action bar).

- Press **<Return>** (to accept the default and file the data).

  Explain the action bar options:

  File/exit: Files the data, creates a record and exits the screen

  Abort: Exits the screen without filing the changes

  Edit: Returns the cursor to the screen for further entry.

NOTE TO PRESENTER: If you do not have a barcode reader, instruct the students to write down each record number on their data cards. You also need to write down the record number for later use in this lesson.

OUTPATIENT VOL 1 Record Number ________________

- Print the labels: **<Return>** (to accept the default).

  Explain that the label prints on the device that is defined in the system's parameters.

  – The MRT number is above the barcode.

  – The hospital number is in front of the dollar sign.

- Select Label Device: **<Return>** (to display the output on the screen).
- Right Margin: 80// **<Return>**
- Enter at Print Routing Cards and/or Charge Cards: **??** (to display a picklist).

  Inform class that either (R)outing Cards, (C)harge Cards, (B)oth, or (N)either may be selected.

- Enter at Print Routing Cards and/or Charge Cards: **C**

  Explain:

  Routing Cards are used when the patient's record is moved between locations, i.e., if the patient has multiple clinic visits.

  Charge cards are used to maintain a record of the individual/location who borrowed a record.

- Select Clinic Appointment Date: TODAY// **<Return>**
- Select Clinic: **CARDIOLOGY**
- Select Clinic: **<Return>**
- Select Charge Card Printer: **<Return>**
- Right Margin: 80// **<Return>**

- Select Patient: **<Return>** (to exit the option).

    Explain:

    If you wish to continue, additional record types and/or volumes can be created for this patient or other registered patients.

    If you press <Return> you are returned to the Transaction Menu.

Practice - This objective is practiced in Practice 1.

■ CREATE A NEW VOLUME FOR AN EXISTING OUTPATIENT RECORD

Scenario: *You have just noticed that a patient's outpatient record is too full. You need to create a second volume.*

The Create a Label/Record/Volume option is also used to create additional volumes for existing patient records.

- Access the Create a Label/Record/Volume (CV) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → CV

- Select Patient: **P0060** (PARR,ALLAN)

  Explain that you can press the spacebar, then <Return> to display the record of the last record accessed.

  Point out that the system displays existing records.

- Choose 1-3: **1**
- Press **<Return>** (to continue).
- Indicate that you wish to create a new record or volume: **Y**
- Enter new record type: **O**(UTPATIENT)

  Point out system message indicating that the patient already has Outpatient record type.

- Indicate that you want to create Outpatient Vol 2: **Y**

  Explain that you can now complete the Record Tracking New Record Ask screen.

- Visually verify the contents of the RT New Record Ask screen.

  Point out the header information indicating that this is for volume 2.

- Press **<Next Screen>** (to display the action bar).
- File the data.

  Point out system message indicating the new volume and associated record number created.

NOTE TO PRESENTER: If you do not have a barcode reader, instruct the students to write down each record number on their data cards. You also need to write down the record number for later use in this lesson.

OUTPATIENT VOL 2 Record Number _______________

- Print the labels:

    Want to Print Labels? **N** (for NO)

- Enter at Print Routing Cards and/or Charge Card: BOTH// **N**

- Select Patient: **<Return>** (to exit option and return to the Transaction Menu)

    Explain that you can press spacebar, then <Return> to display the record(s) you have just created for PARR,ALLAN.

Practice - This objective is practiced in Practice 1.

■ PRINT A LABEL FOR AN EXISTING OUTPATIENT RECORD

Scenario: *An interruption caused you to forget to print the label for the second volume you just created for the patient's record. You need to print the label now.*

You use the Create a Label/Record/Volume option to print a label for a specified patient.

- Access the Create a Label/Record/Volume (CV) option on the Transaction Menu.

  PAD System Menu ➔ MRM ➔ **TM** ➔ CV

- Select Patient: **P0060** (PARR,ALLAN)

  Explain that you can press spacebar, then <Return> to display the record(s) you have just created for PARR,ALLAN.

- Select the label to be printed:

  Use the **down-arrow** key to position the cursor by Volume 2.

  Note: The volume number and order of display do not match, be careful to select the volume you want.

  When the cursor is positioned, press **<Select>**.

  Point out the asterisk (*) that appears next to the category after it has been selected.

  Explain that you can deselect a category by pressing <Select> again.

  Activate the selection by pressing **<Return>**.

- Print the label:

  Want to Print Labels? YES// **<Return>**

  Select Label Device: **<Return>**

  Right Margin: 80// **<Return>**

- Enter at Print Routing Cards and/or Charge Cards?: Both// **N**

  Explain that labels may be printed for additional patients by accessing patient records through the Select Patient Name prompt.

- Select Patient: **<Return>** (to return to the Transaction Menu).

> **NOTE TO PRESENTER**: Do not print routing or charge cards, but inform class that a loan and/or routing card may be printed for a specified patient using the Print Routing/Charge Card option.

STUDENT LOGON

- Discuss data cards (i.e., username, password, area, access, and verify codes).
- Log on to the training software and use specified data.

Practice 1 - Create outpatient records and print labels.

■ CHECK-OUT A RECORD AT THE SAME TIME IT IS CREATED

Scenario: *When you are creating a record, check it out to the Urology Clinic.*

- Access the Create a Label/Record/Volume (CV) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → CV

- Select Patient: **P0060** (PARR,ALLAN)

  Explain that the Medical Records Tracking Profile screen displays.

- Press **<Return>** (to continue).
- Indicate that you wish to create a new record or volume: **Y**
- Enter new record type: **O**(UTPATIENT)
- Indicate that you want to create Outpatient Vol 3: **Y**

  Explain that you can now check-out the record on the Record Tracking New Record Ask screen.

- Confirm Home Location: **<Return>**
- Enter Current Location: **UROLOGY**

  Explain:

  This entry must be an MTF-defined borrower.

  Press ?? to get a list of valid entries.

  This changes the electronic location of the record from the Medical Records File Room to Urology.

- Enter Associated Borrower: **ADDAMS,H**

  Explain that this designates Dr. Addams as an associated borrower.

- Enter Content Descriptor: **FAMILY ADVOCACY**
- File the data.

  Explain that filing this information creates the record and its charge-out.

> **NOTE TO PRESENTER**: If you do not have a barcode reader, instruct the students to write down each record number on their data cards. You also need to write down the record number for later use in this lesson.
>
> OUTPATIENT VOL 3 Record Number ________________

- Enter at Want to Print Labels? YES// **N**
- Enter at Print Routing cards and/or Charge Cards? BOTH// **N**
- Select Patient: **P0060** (PARR,ALLAN)

  Explain:

  You can also press spacebar, then <Return> to display the record(s) you have just created for PARR,ALLAN.

  Vol 1 is displayed as number 3 on the list.

  Vol 3 is checked-out to the borrower and associated borrower.

  The content descriptor displays below the record type.

  Note that the current borrower only stays with the record until the movement is processed.

- Do not create a new record or volume: N// **<Return>**
- Return to the Medical Records Menu.

Practice - This objective is practiced in Practice 2.

■ INQUIRE ABOUT A PATIENT RECORD

Scenario: *A provider from the Orthopedics Clinic has called requesting a patient's record be picked up in about 5 minutes. You need to determine the record's status.*

- Access the Record Inquiry (RI) option on the Record Information Menu.

  PAD System Menu → **MRM** → IN → RI

  Explain:

  The Record Inquiry option provides a detailed listing of all records for a specified patient.

  This option also provides the record number for each volume.

- Select Division: **<Return>**

  Explain:

  This prompt allows you to inquire into patient records with a home location other than the logged-on division.

  The desired division may be entered at this prompt.

- Select Patient: **P0060** (PARR,ALLAN)

  Explain that you can also press spacebar, then <Return> to display the record(s) of the last patient (PARR,ALLAN).

- Indicate what information to display: **??** (to display a picklist).

  Point out that The Medical Records Tracking Profile displays. Select the volume to display.

  Explain that you may enter one of the following:

  All - Displays all volumes for all record types

  Type - Displays all volumes of specific record types

  Volume - Displays specific volumes.

- Verify that you want to display all information: All// **<Return>**

- Print the record:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

DISCUSS THE FIELDS ON THE MEDICAL RECORD INQUIRY SCREEN

Vol 3 is charged-out to ADDAMS,HENRY.

Note the record number for each volume. You will need these numbers later in the class.

Any pending requests also display.

- Press **<Return>** (to exit the option).

- Return to the Record Information Menu.

- Access the Short Record Inquiry (SR) option on the Record Information Menu.

  PAD System Menu → MRM → **IN** → SR

  Explain:

  The Short Record Inquiry option provides an abbreviated on-line listing of all records for a specified patient.

  This option displays the same information as listed on the patient's record tracking profile accessed in most options from the Transaction Menu.

  This option does not display record number or any pending requests.

- Select Division: **<Return>**

- Select Patient: **P0060** (PARR,ALLAN)

- Press **<Return>** (to exit the option).

- Return to the Medical Records Menu.

Practice - This objective is practiced in Practice 2.

■ CHARGE-OUT A RECORD

Scenario: *A patient's outpatient record is needed for a consultation in Orthopedics and the clinic clerk has just arrived to get it. You need to charge-out Volumes 1 and 2 of the outpatient record to the Orthopedics Clinic.*

The Charge-Out Record option is used to charge-out a record as a single transaction.

If the record moves to more than one clinic as the patient makes a continuous round of appointments (for instance, to the ORTHO and primary care clinics), use the Recharge Records option to indicate that the record is transferred to the next borrower without first being checked into a file storage area.

Any record charged to a borrower other than the home location requires that the record be recharged using this option.

- Access the Charge-Out Record (OT) option on the Transaction Menu.

  PAD System Menu ➔ **MRM** ➔ TM ➔ OT

- Refer to Quick Reference Guide: Charge-Out a Record.

- Enter Borrower: **L.ORTHO**

  Explain:

  A record borrower may be a provider, a hospital location, a division, another MTF, or another non-DOD MTF eligible to borrow records.

  The system verifies the borrowing eligibility of all entries at this prompt. The system processes this information more quickly if a prefix denoting the type of borrower is entered with a period before the borrower name:

  P. - Provider

  L. - Location

  D. - Division

  M. - MTF

  NON. - Non-DOD MTF

Not all prefixes are used at each MTF. The most commonly used are (P)rovider, (L)ocation, and (D)ivision.

If you enter a location or borrower that is not in the Hospital Location file, the system asks if you want to add a new borrower to the Hospital Location file.

Always respond 'NO' to this prompt. Numerous additions to the Hospital Location file can have an adverse effect on the Common files.

You may contact the Common files point of contact (POC) at your site to add the new borrower/location to the appropriate file, if needed.

NOTE TO PRESENTER: Most sites turn off the indicator which lists folders currently charged to the borrower. The list is normally too long and cumbersome.

Point out that the Medical Records Tracking folders currently charged to Borrower screen displays.

- Press **<Return>** (to continue).
- Enter Record: **[Record number for OUTPATIENT VOL 1]**

Explain:

Data entered at the flashing cursor pertains to the Select Record prompt at the bottom of the screen.

You may access the record in three ways:

– The patient name, which yields a picklist.

– The patient identifier, which yields a picklist.

– Enter or wand in the record number. This directly accesses the patient record.

- Enter Associated Borrower: **<Return>**

NOTE TO PRESENTER: Remind students that the record number is on the bottom of the MRT label. If they do not have the label, use the Record Inquiry (RI) option to query the patient's record.

- Enter Record: **[Record number for OUTPATIENT VOL 2]**
- Enter Associated Borrower: **<Return>**
- Press **<Return>** (to exit the option).

    Point out the message indicating that the records would now be charged-out.

- Return to the Transaction Menu.

Practice - This objective is practiced in Practice 2.

■ FLAG A RECORD AS MISSING

Scenario: *Orthopedics has just requested the third volume of a patient's outpatient record. You go to the record room location to pull the volume, it is not there and there is no Charge Card. You have determined that it is not overdue and need to flag the record as Missing to ensure other MTF personnel will keep an eye out for it.*

The Flag Record as Missing option is used to flag records identified as lost.

This option may be locked and accessible only to File Room Supervisors. For purposes of this class, all students have access to the option.

When a Missing flag is applied, the system generates a mail bulletin to specified personnel, advising them of the missing record.

- Access the Flag Record as Missing (FR) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → FR

- Refer to Quick Reference Guide: Flag a Record as Missing.
- Enter the missing record: **[Record number for OUTPATIENT VOL 3]**

  Explain:

  Records may be entered using patient identifier, record number, or barcode readers. It saves time to use the record number to flag a record.

  If you use the patient name, you need to select the volume from a list of record types.

- Verify you want to flag the record as missing: NO// **Y**

  Point out the Missing Record Entry screen.

- Enter Supervisor Comments: **LAST CHARGED-OUT TO ORTHO CLINIC**

  Explain:

  This comment provides additional background on the record.

  This comment displays on the Nursing Record Report.

- File the data.

    Point out message indicating that the record has been flagged as Missing.

    Explain:

    A new mail message is generated by the system to the Missing mail group when a record is flagged as Missing.

    If any other option is used in an attempt to process a record flagged as Missing, the system displays a message indicating the Missing status and states that no further action may be taken until the flag is removed.

    Missing flags may be removed using this option, the Check-In Record, or Charge-Out Record options.

- Press **<Return>** (to exit the option).
- Access MailMan by entering **MAIL** at the menu prompt.
- Display the missing record mail bulletin located in the IN Basket:

    Select the New Messages and Responses (NML) option to display the Missing record message.

- Return to the Medical Records Menu.

SHOW USERS THE PATIENT'S MEDICAL RECORD TRACKING PROFILE WHEN THE RECORD IS MISSING

Scenario: *Supervisor verification is needed when the Missing flag is removed.*

NOTE TO PRESENTER: Refer to Commonly Asked Questions.

- Access the Short Record Inquiry (SR) option on the Record Information Menu.

    PAD System Menu → **MRM** → IN → SR

- Select Division: **<Return>**

- Select Patient Name: **P0060** (PARR,ALLAN)

  Explain:

  The current borrower field for Volume 3 is blank. This indicates that it has been flagged as Missing.

  Remind students that the item number in column one of this screen does not match the volume number.

- Return to the Medical Records Menu.

Practice - This objective is practiced in Practice 2.

■ CHECK-IN A RECORD

Scenario: *The clerk from Orthopedics has just returned the second volume of a patient's outpatient record and you need to check it in.*

The Check-In Record option is used to record the return of borrowed records to their home location file room.

The system records the record being returned, as well as the date and time of return.

Any record inquiry then reflects the home file room as the current borrower each time it is accessed through the Record Tracking System options.

- Access the Check-In Record (IN) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM→ IN

- Refer to Quick Reference Guide: Check-In a Record.

  Note the screen indicating Records Selected to Be Checked into Medical Records File Room.

- Enter the record to be checked in: **[Record number for OUTPATIENT VOL 2]**

  Review the following information:

  Records may be entered using patient identifier, record number, or barcode readers. It saves time to use the record number to check-in a record.

  If you use the patient name, you need to select the volume from a list of record types.

- Press **<Return>** (to exit the option).

  Point out:

  The message indicating that the record is checked-in.

  The Transaction Menu displays.

Practice - This objective is practiced in Practice 2.

■ REMOVE A MISSING FLAG AS RECORDS ARE CHECKED-OUT TO A PATIENT

Scenario: *A patient arrives at the record room who has a consultation appointment off-site. The patient has the third volume of outpatient record and needs to take the second volume for the appointment. Access the Patient Check-Out option. The third volume has been flagged as Missing. Remove the Missing flag from Vol 3 and check it out to the patient. Then check-out Vol 2 to the patient.*

The Patient Check-Out option is used to record a patient as the borrower of his or her own record, as well as to record the date and time of charge-out.

During patient check-out, messages display when:

– The loose filing indicator has been set for the record.

– The patient is an inpatient.

– A Missing flag has been set.

– Pending requests exist.

Missing flags may be removed and pending requests may be filled when the associated record is checked-in using the Check-In Record (IN) option.

Normally, however, removing a Missing flag is performed in conjunction with another record movement.

For example, using this scenario, you may remove the Missing flag through the Patient Check-Out option, as well as other Transaction Menu options.

Or you may remove a Missing flag using the Flag a Record as Missing option.

- Access the Patient Check-Out (PC) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → PC

- Refer to Quick Reference Guide: Remove a Missing Flag.

- Enter the missing record: **[Record number for OUTPATIENT VOL 3]**

  Note the message indicating that Vol 3 is flagged as Missing.

- Indicate that you want to remove the Missing flag: **Y**

  Explain that sites determine who can remove the Missing flag. They may restrict this option to supervisors or include clerk-level personnel.

  Point out Finding Missing Records screen.

- Enter where the record was found: **CHARGED TO PATIENT**

  Explain that the system only allows the borrower here. Entry must be a provider/person, location, or division defined in the system.

- Enter the reason: **HELD BY PATIENT**

  Explain:

  Reasons are defined by MTF.

  Enter ?? to display the picklist.

- Enter Supervisor Comments: **PATIENT FOUND RECORD IN CAR**

  Explain:

  Access to the User Comments field and Supervisor Comments field is dependents on the user's job. For this class, there is no difference.

  The comment entered when the record is flagged as Missing displays here. You may leave the comment, delete it, or enter a new comment. The comment entered displays on the Missing Record Report

- File the data.

  Note the messages indicating that the Missing flag is removed and the record is charged-out to the patient.

  Explain:

  A MailMan message is generated stating the record was found.

  You can now charge-out Vol 2 to the patient.

- Charge-out Vol 2 using the Charge-out Record (OT) option:

  Select Transaction Menu option: **OT**

  Select Borrower: **PATIENT** (for Charged to Patient).

Select Record: **[Record number for OUTPATIENT VOL 2]**

Associated Borrower: **<Return>**

Select Record: **<Return>** (to quit selecting records to be charged-out).

Select Borrower: **<Return>** (to exit the option).

- Return to the Medical Records Menu.

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

■ CREATE A BATCH LIST

Scenario: *You are tasked with processing Pull Products one day before scheduled appointments. You need to initialize and process Batch Lists for a clinic.*

DISCUSS PULL PRODUCTS PROCESSING

Pull Products are lists used to pull records for scheduled clinic and radiology appointments.

– Pull Products are lists containing both Batch Lists and Pull Lists.

– Batch Lists contain appointments not having medical records.

– Pull Lists contain appointments having medical records.

Pull Products processing uses options from the Pull List Functions Menu to create one Pull List from these two lists.

– A process called initialization creates Batch and Pull Lists.

– After initialization has taken place, Pull Products processing creates one Pull List so that records may be charged-out in advance of appointments.

• Refer to Reference Manual, Procedure Flow Charts: Pull Products Processing, and review process.

Discuss Batch List Processing

Options on the Batch Record Creation Menu are designed to automate the creation of records. The options include:

– Create Batch and Pull Lists.

– Print Batch Lists.

– Delete entries from the Batch List.

– Create records from a Batch List.

• Refer to Reference Manual, Procedure Flow Charts: Record Creation, and review process.

NOTE TO PRESENTER: Remind students that Batch Lists are initialized from appointments scheduled for patients without a record in the Record Tracking application.

- Refer to Reference Manual, Procedure Flow Charts: Batch List Processing, and review process.

Discuss the Create Batch and Pull Lists from Schedules Option

The Create Batch and Pull Lists from Schedules option searches among scheduled appointments for a particular date and clinic and recognizes whether the patient for whom an appointment is scheduled, has a record in the system.

– If there is no record for the patient, an entry is made on the Batch List.

– If the patient does have a record, an entry is made on the Pull List.

- Access the Create Batch and Pull Lists from Schedules (IN) option on the Batch Record Creation Menu.

  PAD System Menu → **MRM** → PL → BR → IN

- Enter Clinic Name: **CARDIOLOGY CLINIC**

  Explain:

  All Pull Products for all clinics for a specified date will be initialized at one time, most likely from the largest file room at the MTF.

  To initialize all Pull Products, the Clinic prompt is bypassed, and the date for Pull Product initialization is entered.

- Enter Pull Date: **0624**

  Explain:

  The pull date for this example is one day before the appointment.

  The pull date is site-determined.

- Enter Device for Message: **NL:**

- Enter Requested Start Time: NOW// **<Return>**

NOTE TO PRESENTER: In the file room, a message prints to the designated LA75 printer when the process is complete.

Point out that the system returns to the Batch Record Creation Menu.

Practice - This objective is practiced in Practice 3.

■ PRINT BATCH LIST ENTRIES

Scenario: *You need to print the Batch List to verify that requested records are on the shelf.*

- Access the Print Batch List (PP) option on the Batch Record Creation Menu.

  PAD System Menu → MRM → PL → **BR** → PP

- Enter the Batch List: **CARDIOLOGY**

  Explain:

  You print at this time to use the Batch List and check to see if records are available.

  You can print Batch Lists for all clinics or selected clinics. For our example, print only for the Cardiology Clinic.

  A clinic can have more than one listing because Batch Lists are based on appointment date.

  The length of time required to process the Batch List depends on the number of records in the list. If the Batch List does not print right away, try again later.

- List entries to print: **??** (to display a picklist).

  Explain that a Batch List may be printed for:

  – Printed (entries that have been previously printed).

  – Un-printed (entries that have not yet been printed). This includes only those appointments made after you created your batch list.

  – All (all entries appearing on the Batch List).

- List Which Entries: **ALL**
- Print Routing Cards and/or Charge Cards? **N**

> **NOTE TO PRESENTER**: The file room prints Charge Cards, then pulls the record for each card, leaving the card in place of the file. Users may print cards at this time, or later when they print the Pull List.

- Print entries:

    Device: **<Return>**

    Right Margin: 80// **<Return>**

        Explain that the system prints a listing of all record types requested by patient name.

- Return to the Batch Record Creation Menu.

Practice - This objective is practiced in Practice 3.

■ DELETE ENTRIES FROM THE BATCH LIST

Scenario: *You discover that a patient does not have a file. You must delete this patient from the Batch List so that a medical record is not created.*

DISCUSS BATCH EDITING

Once the Batch List is printed, it may be used to verify against the records on the shelf.

Batch List entries that do not have a record on the shelf can not be charged-out. Do not create a medical record for these entries.

- Access the Delete Entries from Batch (EB) option on the Batch Record Creation Menu.

  PAD System Menu → MRM → PL → **BR** → EB

- Select a Batch List: **CARDIOLOGY**

  Explain that you can enter a double question mark (??) at this prompt to display the batch lists currently in the system.

- List the entries to print: **ALL**

- Select the entry to delete: **CARLTON,CHARLES**

  Use the **down-arrow** key to position the cursor by the patient.

  When the cursor is positioned, press **<Select>**.

  Point out the asterisk (*) that appears next to the patient after it has been selected.

  Explain that you can deselect a category by pressing <Select> again.

  Activate the selection by pressing **<Return>**.

- Verify that you want to delete the selected entry: NO// **Y**

  Point out that the Y entered at this prompt does not display.

  The system returns to the Batch Record Creation Menu.

Practice - This objective is practiced in Practice 3.

■ CREATE RECORDS FROM A BATCH LIST

Scenario: *You have verified the names against the records on your shelf for the Cardiology Batch List. You can now create records for the names on that Batch List.*

The system automatically creates records and prints labels using the Create Records from Batch option.

An entry for the newly created record:

– Is added to the Pull List for the corresponding clinic/date, if the Pull List exists.

– Creates a Pull List for the corresponding clinic/date, if the Pull List does not exist.

This allows for all records to be charged-out at one time. This will be covered in more detail in Module 3.

- Access the Create Records from Batch (CR) option on the Batch Record Creation Menu.

  PAD System Menu → MRM → PL → **BR** → CR

- Enter the Batch List: **CARDIOLOGY**
- Enter the Record Label Printer: **NL:**
- Return to the Medical Records Menu.

INQUIRE INTO PATIENT'S RECORD

New medical records have been created for patient(s) who appeared on the Batch List Print.

- Access the Record Inquiry (RI) option on the Record Information Menu.

  PAD System Menu → **MRM** → IN → RI

- Select Division: **<Return>**
- Select Patient Name: **DELAFIELD,BOYD**
- Confirm patient name: **<Return>**
- Indicate which information to display: ALL// **<Return>**

- Display the record:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

  Point out the record number created for the outpatient record of Boyd Delafield and the record request profile.

- Return to the Medical Records Menu.

Practice 3 - Process a Batch List.

■ PRINT A PULL LIST

Scenario: *You have created the Batch List. You now need to continue the process and print the Pull List you have just created for Cardiology.*

- Refer to Reference Manual, Procedure Flow Charts: Create Pull List, and review process.
- Access the Print Pull List(s) (PT) option on the Pull List Functions Menu.

  PAD System Menu → **MRM** → PL → PT

  Note the system display of division for which Pull Lists are available.

- Select Pull List: **??** (to display a picklist).

  Explain:

  Pull Lists may have one of three statuses:

  – Requested status indicates the records in the Pull List have been requested and are not yet charged out. This is also known as a Pending request.

  – Charged status indicates the items on the Pull List have been charged to the borrower for whom it is requested.

  – Canceled status indicates that Pull List has been canceled or deleted, and requested records no longer need to be pulled.

- Enter Pull List: **CARDIOLOGY CLINIC**
- Sort the Pull List: **??** (to display a picklist).

  Explain that the Pull List may be sorted by:

  – Terminal digits

  – Clinic name (for sort by clinic name, then by terminal digits)

  – Appointment time (for sort by clinic name, then by appointment time)

  – Patient name (for sort by clinic name, then by patient name).

- Sort the Pull List: **C** (for clinic name).

- Select Type of List: **??** (to display a picklist).

  Explain:

  List types include the following:

ALL	-	Include all appointment types
Not Fillable	-	Print a short not-fillable list
Detail-Not Fillable	-	Print a detailed non-fillable list
Update	-	Only include updates to list

  Available entries and Routing and Loan Cards can be printed when ALL and UPDATE are selected.

  Inform class that routing cards print only when a patient has multiple appointments for that day.

- Verify that you want to include all appointments: ALL// **<Return>**

- Enter at Print Routing Cards and/or Charge Cards: BOTH// **N**

- Select Pull List Printer: **WIDE**

  Explain:

  The Pull List shows the status of each requested record.

  A Requested status indicates the record is available to charge-out.

  Records with a Missing, Transferred, or Inactivated status may be deleted from the Pull List using the Cancel Request from Pull List option.

- Return to the Pull List Functions Menu.

❑ CANCEL REQUEST FROM PULL LIST

Scenario: *After checking for the availability of records on the list, you discover a Missing file. Cancel that request from the Pull List. Then print the Pull List to show the effect of the cancel.*

- Access the Cancel Request from Pull List (FR) option on the Pull List Functions Menu.

  PAD System Menu → MRM → **PL** → FR

  Explain that you can cancel specific requests from the Pull List before charge-out takes place.

- Enter the Pull List: **CARDIOLOGY**

- Select Request: **??** (to display a picklist).

  Explain that the requested records display and you can enter request number or patient name in the request prompt.

- Select Request: **2** (SHAW,FLORENCE)

  Explain that when patient name is entered, the patient profile displays, from which the record may be selected to designate as Not Fillable.

  Point out that you return to the Select Request prompt where you may enter other requests to cancel from the Pull List.

- Select Request: **<Return>**

- Verify that you want to cancel the request for patient Florence Shaw: NO// **Y**

  Point out the message indicating the request has been canceled.

- Remain at the Pull List Functions Menu.

Practice - This objective is practiced in Practice 4.

■ CHARGE-OUT A PULL LIST

Scenario: *You have verified the Pull List against your files. With one exception, your list is correct. Designate that request as Unfillable and charge-out the Pull List.*

- Access the Charge-Out Pull List Records (OU) option on the Pull List Functions Menu.

  PAD System Menu → MRM → **PL** → OU

- Designate a request as Not Fillable: NO// **Y**

  Explain that before you charge-out the Pull List, you have the opportunity to designate a request as Not Fillable.

- Enter the Request: **1** (NEEB,ALTHEA)

  Explain:

  The patient record for Althea Neeb displays.

  Enter a double question mark (??) to display the list of requests.

  Point out the current status of Request 1.

- Verify that you want to change the status to Not Fillable: **<Return>**

- Select Request: **<Return>**

  Explain that you are returned to this prompt where you can designate other requests as Not Fillable.

- Enter Pull List: **CARDIOLOGY CLINIC**

- Verify that this record is not to be charged out to a holding area: NO// **<Return>**

  Explain:

  Charging-out records to a holding area allows for records to be pulled and available the day before scheduled appointments.

  Responding Y(ES) requires that holding area name be entered.

Charge-out to a holding area changes Pull List status from Requested to Charged. Individual status of each request, however, remains as Requested so that pulled records will not reflect an early charge date if they are pulled before the scheduled appointment date.

When a record is charged-out to a requestor, the Charge-Out Pull List Records option is used again to change status to Charged. Each individual record is still Requested because it hasn't left the room.

- Verify that you want to charge-out records: NO// **Y**
- Enter Device: **WIDE**

  Explain that the Pull List Charge-Out Log indicates the date and time that the Pull List was charged-out.

- Return to the Pull List Functions Menu.
- Access the Print Pull List(s) (PT) option on the Pull List Functions Menu.

  PAD System Menu → MRM → **PL** → PT

- Enter Pull List: **CARDIOLOGY CLINIC**
- Sort the Pull List: **C** (for clinic name)
- Verify that you want to include all types: ALL// **<Return>**
- Bypass printing Routing Cards and/or Charge Cards: **N**
- Print the Pull List to the screen:

  Device: **WIDE**

  Point out that the status for each request is changed to Charged, except for Althea Neeb, which is Not Fillable.

- Return to the PAD System Menu.
- Refer to Reference Manual, Procedure Flow Chart: Create Pull List, and review Pull List functions.

Practice 4 - Process a Pull List.

III. BRIEF PRESENTATION

INTRODUCE THE PATIENT ADMINISTRATION (PAD) SYSTEM MENU

- Log on to CHCS and access the PAD System Menu.

The PAD System Menu is the primary menu for patient administration-related functions using CHCS.

INTRODUCE THE PATIENT ADMINISTRATION REFERENCE MANUAL

A reference manual is available at each terminal for use in the classroom.

– The manual is also available at your workcenter.

– All menu definitions are contained in the manual.

- Refer to the Patient Administration Reference Manual for applicable menu diagrams and definitions and procedural flowcharts.

- Enter **???** (to access the menu option descriptions online).

- Press **<Return>** to access remainder of help text or press **<^>** to exit the help listing.

■ CREATE AN OUTPATIENT RECORD FOR A REGISTERED PATIENT

Scenario: *A patient has recently been transferred to the base serviced by your clinic. He is under continuing care for a recent auto accident. He has been registered in CHCS and has brought his records from the previous treatment facility. You need to create his outpatient record and print the labels.*

OVERVIEW OF THE MEDICAL RECORD TRACKING SYSTEM

The purpose of the CHCS Record Tracking System is to electronically track patient records, medical or dental, their location and availability to be charged out.

The system is specifically designed to track the location of a record and its availability to be charged out.

The tracking is achieved through the creation of an electronic record and printed labels that identify records by patient name or identification number (ID#).

These labels are human- and machine-readable through barcodes.

Medical record tracking (MRT) functions provide:

- Loan control.
- Record transfer and retirement.
- Data and statistics necessary for record management.

The system allows you to:

- Create records and print labels, both automatically and manually.
- Generate Pull Lists.
- Check-in and charge-out records.
- Track individual record statuses, locations, and pending requests.
- Flag records that are missing, or are inactivated for various reasons.
- Generate lists of those records eligible for transfer and/or retirement.
- Generate the reports necessary to manage department activities.
- Generate electronic messages to notify tracking system users of information concerning specific patient records.

The CHCS Record Tracking system is designed to integrate many functions in the Patient Administration (PAD), Patient Appointment and Scheduling (PAS), and Radiology (RAD) Subsystems.

It responds to a series of triggers generated by any or all of those subsystems.

Creation of Records

Records for tracking patient medical records may be created when:

– A patient is registered through PAD registration options.

– A patient is admitted to the hospital. Inpatient records are created automatically when a patient is admitted to the facility.

– An appointment is scheduled for a registered patient who does not have a record in the MRT system.

– Batch List and Pull List entries are available to be initialized when a patient appointment is scheduled.

System-Generated Messages or Entries

– Record request notices are generated when patients check-in for unscheduled appointments.

– Mail messages are generated when patient records are identified as missing, found or deleted. This is an optional feature on the system.

– An entry is generated on the pending request list when a requested record is currently charged out.

– Entries are generated on the overdue list when the current borrower has not returned a record within an MTF-specified time.

The creation of records and record labels is a function of the CHCS Record Tracking System.

An MRT record consists of the following:

– Patient identifier – name or family member prefix (FMP)/Social Security number (SSN)

– Record type

– Volume number

– Record number

– Current location

– Home location

– Status.

CHCS has two record tracking applications:

– Patient Administration Medical Record Tracking

– Radiology Image Tracking.

Data that supports these applications defines the file rooms, record types, and the parameters under which record tracking applications are operated, such as the number of days after which a borrowed record is tagged as overdue.

- Refer to Reference Manual, Procedure Flow Charts: Record Creation, and review process.

- Access the Medical Records Menu (MRM) option on the PAD System Menu.

  PAD System Menu ➔ MRM

- Confirm Medical Records File Room as the file room location: **<Return>**

- Accept the file room's default devices: **<Return>**

Describe Each Option on the Medical Records Menu

- Access the Transaction Menu (TM) option on the Medical Records Menu.

  PAD System Menu ➔ **MRM** ➔ TM

- Refer to Reference Manual, Menu Diagrams & Definitions: Transaction Menu, and review the functions performed when each menu option is used.

- Return to the Medical Records Menu.

- Access the Pull List Functions Menu (PL) option on the Medical Records Menu.

  PAD System Menu ➔ **MRM** ➔ PL

NOTE TO PRESENTER: Define borrower as any hospital location, provider, or other entity specified by the MTF as eligible to request and borrow patient records.

You create pull lists in two ways.

- Clinic Pull Lists are created automatically by the system as appointments are made through scheduling options.
- Ad Hoc Pull Lists are created using the Create a Pull List option on an as-needed basis, such as for tumor registry or peer review.

- Refer to the Designate Requests as Not Fillable option.
- Refer to Reference Manual, Menu Diagrams & Definitions: Pull List Functions Menu, and review the functions performed when each menu option is used.
- Access the Batch Record Creation Menu (BR) option on the Pull List Functions Menu.

PAD System Menu → MRM → **PL** → BR

- Refer to Reference Manual, Menu Diagrams & Definitions: Batch Record Creation Menu, and review the functions performed when each menu option is used.
- Return to the Medical Records Menu.
- Access the Request Record Menu (RR) option on the Medical Records Menu.

PAD System Menu → **MRM** → RR

- Refer to Reference Manual, Menu Diagrams & Definitions: Request Record Menu, and review the functions performed when each menu option is used.
- Return to the Medical Records Menu.
- Access the Record Information Menu (IN) option on the Medical Records Menu.

PAD System Menu → **MRM** → IN

- Refer to Reference Manual, Menu Diagrams & Definitions: Record Information Menu, and review the functions performed when each menu option is used.

- Return to the Medical Records Menu.
- Access the Management Reports Menu (MA) option on the Medical Records Menu.

  PAD System Menu → **MRM** → MA

- Refer to Reference Manual, Procedure Flowcharts: Generating Management Report Entries, and review the information.
- Refer to Reference Manual, Menu Diagrams & Definitions: Management Reports Menu, and review the functions performed when each menu option is used.
- Return to the Medical Records Menu.
- Access the Create a Label/Record/Volume (CV) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM → CV

- Refer to Quick Reference Guide: Create a Record.
- Select Patient: **P0060** (PARR,ALLAN)
- Enter at Choose 1-3: **1**
- Press **<Return>** (to continue).
- Indicate that you wish to create a new record or volume: **Y**
- Enter new record type: **O**(UTPATIENT)
- Visually verify the information on the RT New Record Ask screen:

  Home Location: [default record room]

  Current Location: [default record room]

  Enter Associated Borrower:

  Enter Content Descriptor:

- If data is acceptable as is, press **<Next Screen>** (to display the action bar).
- Press **<Return>** (to accept the default and file the data).

> **NOTE TO PRESENTER:** If you do not have a barcode reader, instruct the students to write down each record number on their data cards. You also need to write down the record number for later use in this lesson.
>
> OUTPATIENT VOL 1 Record Number ________________

- Print the labels: **<Return>** (to accept the default).
- Select Label Device: **<Return>** (to display the output on the screen).
- Right Margin: 80// **<Return>**
- Enter at Print Routing Cards and/or Charge Cards: **??** (to display a picklist).
- Enter at Print Routing Cards and/or Charge Cards: **C**
- Select Clinic Appointment Date: TODAY// **<Return>**
- Select Clinic: **CARDIOLOGY**
- Select Clinic: **<Return>**
- Select Charge Card Printer: **<Return>**
- Right Margin: 80// **<Return>**
- Select Patient: **<Return>** (to exit the option).

Practice - This objective is practiced in Practice 1.

■ CREATE A NEW VOLUME FOR AN EXISTING OUTPATIENT RECORD

Scenario: *You have just noticed that a patient's outpatient record is too full. You need to create a second volume.*

The Create a Label/Record/Volume option is also used to create additional volumes for existing patient records.

- Access the Create a Label/Record/Volume (CV) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → CV

- Select Patient: **P0060** (PARR,ALLAN)
- Choose 1-3: **1**
- Press **<Return>** (to continue).
- Indicate that you wish to create a new record or volume: **Y**
- Enter new record type: **O**(UTPATIENT)
- Indicate that you want to create Outpatient Vol 2: **Y**
- Visually verify the contents of the RT New Record Ask screen.
- Press **<Next Screen>** (to display the action bar).
- File the data.

NOTE TO PRESENTER: If you do not have a barcode reader, instruct the students to write down each record number on their data cards. You also need to write down the record number for later use in this lesson.

OUTPATIENT VOL 2 Record Number ________________

- Print the labels:

  Want to Print Labels? **N** (for NO)

- Enter at Print Routing Cards and/or Charge Card: BOTH// **N**
- Select Patient: **<Return>** (to exit option and return to the Transaction Menu)

Practice - This objective is practiced in Practice 1.

■ PRINT A LABEL FOR AN EXISTING OUTPATIENT RECORD

Scenario: *An interruption caused you to forget to print the label for the second volume you just created for the patient's record. You need to print the label now.*

You use the Create a Label/Record/Volume option to print a label for a specified patient.

- Access the Create a Label/Record/Volume (CV) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → CV

- Select Patient: **P0060** (PARR,ALLAN)

- Select the label to be printed:

  Use the **down-arrow** key to position the cursor by Volume 2.

  Note: The volume number and order of display do not match, be careful to select the volume you want.

  When the cursor is positioned, press **<Select>**.

  Activate the selection by pressing **<Return>**.

- Print the label:

  Want to Print Labels? YES// **<Return>**

  Select Label Device: **<Return>**

  Right Margin: 80// **<Return>**

- Enter at Print Routing Cards and/or Charge Cards?: Both// **N**

- Select Patient: **<Return>** (to return to the Transaction Menu).

> **NOTE TO PRESENTER**: Do not print routing or charge cards, but inform class that a loan and/or routing card may be printed for a specified patient using the Print Routing/Charge Card option.

STUDENT LOGON

- Discuss data cards (i.e., username, password, area, access, and verify codes).
- Log on to the training software and use specified data.

Practice 1 - Create outpatient records and print labels.

■ CHECK-OUT A RECORD AT THE SAME TIME IT IS CREATED

Scenario: *When you are creating a record, check it out to the Urology Clinic.*

- Access the Create a Label/Record/Volume (CV) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → CV

- Select Patient: **P0060** (PARR,ALLAN)
- Press **<Return>** (to continue).
- Indicate that you wish to create a new record or volume: **Y**
- Enter new record type: **O**(UTPATIENT)
- Indicate that you want to create Outpatient Vol 3: **Y**
- Confirm Home Location: **<Return>**
- Enter Current Location: **UROLOGY**
- Enter Associated Borrower: **ADDAMS,H**
- Enter Content Descriptor: **FAMILY ADVOCACY**
- File the data.

> **NOTE TO PRESENTER**: If you do not have a barcode reader, instruct the students to write down each record number on their data cards. You also need to write down the record number for later use in this lesson.
>
> OUTPATIENT VOL 3 Record Number ________________

- Enter at Want to Print Labels? YES// **N**
- Enter at Print Routing cards and/or Charge Cards? BOTH// **N**
- Select Patient: **P0060** (PARR,ALLAN)

- Do not create a new record or volume: N// **<Return>**
- Return to the Medical Records Menu.

Practice - This objective is practiced in Practice 2.

■ INQUIRE ABOUT A PATIENT RECORD

Scenario: *A provider from the Orthopedics Clinic has called requesting a patient's record be picked up in about 5 minutes. You need to determine the record's status.*

- Access the Record Inquiry (RI) option on the Record Information Menu.

  PAD System Menu → **MRM** → IN → RI

- Select Division: **<Return>**
- Select Patient: **P0060** (PARR,ALLAN)
- Indicate what information to display: **??** (to display a picklist).
- Verify that you want to display all information: All// **<Return>**
- Print the record:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

DISCUSS THE FIELDS ON THE MEDICAL RECORD INQUIRY SCREEN

Vol 3 is charged-out to ADDAMS,HENRY.

Note the record number for each volume. You will need these numbers later in the class.

Any pending requests also display.

- Press **<Return>** (to exit the option).
- Return to the Record Information Menu.
- Access the Short Record Inquiry (SR) option on the Record Information Menu.

  PAD System Menu → MRM → **IN** → SR

- Select Division: **<Return>**
- Select Patient: **P0060** (PARR,ALLAN)

- Press **<Return>** (to exit the option).
- Return to the Medical Records Menu.

Practice - This objective is practiced in Practice 2.

■ CHARGE-OUT A RECORD

Scenario: *A patient's outpatient record is needed for a consultation in Orthopedics and the clinic clerk has just arrived to get it. You need to charge-out Volumes 1 and 2 of the outpatient record to the Orthopedics Clinic.*

The Charge-Out Record option is used to charge-out a record as a single transaction.

If the record moves to more than one clinic as the patient makes a continuous round of appointments (for instance, to the ORTHO and primary care clinics), use the Recharge Records option to indicate that the record is transferred to the next borrower without first being checked into a file storage area.

Any record charged to a borrower other than the home location requires that the record be recharged using this option.

- Access the Charge-Out Record (OT) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM → OT

- Refer to Quick Reference Guide: Charge-Out a Record.
- Enter Borrower: **L.ORTHO**

> **NOTE TO PRESENTER:** Most sites turn off the indicator which lists folders currently charged to the borrower. The list is normally too long and cumbersome.

- Press **<Return>** (to continue).
- Enter Record: **[Record number for OUTPATIENT VOL 1]**
- Enter Associated Borrower: **<Return>**

> **NOTE TO PRESENTER**: Remind students that the record number is on the bottom of the MRT label. If they do not have the label, use the Record Inquiry (RI) option to query the patient's record.

- Enter Record: **[Record number for OUTPATIENT VOL 2]**
- Enter Associated Borrower: **<Return>**

- Press **<Return>** (to exit the option).
- Return to the Transaction Menu.

Practice - This objective is practiced in Practice 2.

■ FLAG A RECORD AS MISSING

Scenario: *Orthopedics has just requested the third volume of a patient's outpatient record. You go to the record room location to pull the volume, it is not there and there is no Charge Card. You have determined that it is not overdue and need to flag the record as Missing to ensure other MTF personnel will keep an eye out for it.*

The Flag Record as Missing option is used to flag records identified as lost.

This option may be locked and accessible only to File Room Supervisors. For purposes of this class, all students have access to the option.

When a Missing flag is applied, the system generates a mail bulletin to specified personnel, advising them of the missing record.

- Access the Flag Record as Missing (FR) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → FR

- Refer to Quick Reference Guide: Flag a Record as Missing.
- Enter the missing record: **[Record number for OUTPATIENT VOL 3]**
- Verify you want to flag the record as missing: NO// **Y**
- Enter Supervisor Comments: **LAST CHARGED-OUT TO ORTHO CLINIC**
- File the data.
- Press **<Return>** (to exit the option).
- Access MailMan by entering **MAIL** at the menu prompt.
- Display the missing record mail bulletin located in the IN Basket:

  Select the New Messages and Responses (NML) option to display the Missing record message.

- Return to the Medical Records Menu.

SHOW USERS THE PATIENT'S MEDICAL RECORD TRACKING PROFILE WHEN THE RECORD IS MISSING

Scenario: *Supervisor verification is needed when the Missing flag is removed.*

NOTE TO PRESENTER: Refer to Commonly Asked Questions.

- Access the Short Record Inquiry (SR) option on the Record Information Menu.

  PAD System Menu → **MRM** → IN → SR

- Select Division: **<Return>**
- Select Patient Name: **P0060** (PARR,ALLAN)
- Return to the Medical Records Menu.

Practice - This objective is practiced in Practice 2.

■ CHECK-IN A RECORD

Scenario: *The clerk from Orthopedics has just returned the second volume of a patient's outpatient record and you need to check it in.*

The Check-In Record option is used to record the return of borrowed records to their home location file room.

The system records the record being returned, as well as the date and time of return.

Any record inquiry then reflects the home file room as the current borrower each time it is accessed through the Record Tracking System options.

- Access the Check-In Record (IN) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM→ IN

- Refer to Quick Reference Guide: Check-In a Record.

  Note the screen indicating Records Selected to Be Checked into Medical Records File Room.

- Enter the record to be checked in: **[Record number for OUTPATIENT VOL 2]**

- Press **<Return>** (to exit the option).

Practice - This objective is practiced in Practice 2.

■ REMOVE A MISSING FLAG AS RECORDS ARE CHECKED-OUT TO A PATIENT

Scenario: *A patient arrives at the record room who has a consultation appointment off-site. The patient has the third volume of outpatient record and needs to take the second volume for the appointment. Access the Patient Check-Out option. The third volume has been flagged as Missing. Remove the Missing flag from Vol 3 and check it out to the patient. Then check-out Vol 2 to the patient.*

The Patient Check-Out option is used to record a patient as the borrower of his or her own record, as well as to record the date and time of charge-out.

During patient check-out, messages display when:

– The loose filing indicator has been set for the record.

– The patient is an inpatient.

– A Missing flag has been set.

– Pending requests exist.

Missing flags may be removed and pending requests may be filled when the associated record is checked-in using the Check-In Record (IN) option.

Normally, however, removing a Missing flag is performed in conjunction with another record movement.

For example, using this scenario, you may remove the Missing flag through the Patient Check-Out option, as well as other Transaction Menu options.

Or you may remove a Missing flag using the Flag a Record as Missing option.

- Access the Patient Check-Out (PC) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → PC

- Refer to Quick Reference Guide: Remove a Missing Flag.
- Enter the missing record: **[Record number for OUTPATIENT VOL 3]**

  Note the message indicating that Vol 3 is flagged as Missing.

- Indicate that you want to remove the Missing flag: **Y**
- Enter where the record was found: **CHARGED TO PATIENT**
- Enter the reason: **HELD BY PATIENT**
- Enter Supervisor Comments: **PATIENT FOUND RECORD IN CAR**
- File the data.

  Note the messages indicating that the Missing flag is removed and the record is charged-out to the patient.

- Charge-out Vol 2 using the Charge-out Record (OT) option:

  Select Transaction Menu option: **OT**

  Select Borrower: **PATIENT** (for Charged to Patient).

  Select Record: **[Record number for OUTPATIENT VOL 2]**

  Associated Borrower: **<Return>**

  Select Record: **<Return>** (to quit selecting records to be charged-out).

  Select Borrower: **<Return>** (to exit the option).

- Return to the Medical Records Menu.

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

■ CREATE A BATCH LIST

Scenario: *You are tasked with processing Pull Products one day before scheduled appointments. You need to initialize and process Batch Lists for a clinic.*

DISCUSS PULL PRODUCTS PROCESSING

Pull Products are lists used to pull records for scheduled clinic and radiology appointments.

– Pull Products are lists containing both Batch Lists and Pull Lists.

– Batch Lists contain appointments not having medical records.

– Pull Lists contain appointments having medical records.

Pull Products processing uses options from the Pull List Functions Menu to create one Pull List from these two lists.

– A process called initialization creates Batch and Pull Lists.

– After initialization has taken place, Pull Products processing creates one Pull List so that records may be charged-out in advance of appointments.

• Refer to Reference Manual, Procedure Flow Charts: Pull Products Processing, and review process.

Discuss Batch List Processing

Options on the Batch Record Creation Menu are designed to automate the creation of records. The options include:

– Create Batch and Pull Lists.

– Print Batch Lists.

– Delete entries from the Batch List.

– Create records from a Batch List.

• Refer to Reference Manual, Procedure Flow Charts: Record Creation, and review process.

> **NOTE TO PRESENTER:** Remind students that Batch Lists are initialized from appointments scheduled for patients without a record in the Record Tracking application.

- Refer to Reference Manual, Procedure Flow Charts: Batch List Processing, and review process.

Discuss the Create Batch and Pull Lists from Schedules Option

The Create Batch and Pull Lists from Schedules option searches among scheduled appointments for a particular date and clinic and recognizes whether the patient for whom an appointment is scheduled, has a record in the system.

– If there is no record for the patient, an entry is made on the Batch List.

– If the patient does have a record, an entry is made on the Pull List.

- Access the Create Batch and Pull Lists from Schedules (IN) option on the Batch Record Creation Menu.

  PAD System Menu → **MRM** → PL → BR → IN

- Enter Clinic Name: **CARDIOLOGY CLINIC**
- Enter Pull Date: **0624**
- Enter Device for Message: **NL:**
- Enter Requested Start Time: NOW// **<Return>**

> **NOTE TO PRESENTER**: In the file room, a message prints to the designated LA75 printer when the process is complete.

Practice - This objective is practiced in Practice 3.

■ PRINT BATCH LIST ENTRIES

Scenario: *You need to print the Batch List to verify that requested records are on the shelf.*

- Access the Print Batch List (PP) option on the Batch Record Creation Menu.

  PAD System Menu → MRM → PL → **BR** → PP

- Enter the Batch List: **CARDIOLOGY**
- List entries to print: **??** (to display a picklist).
- List Which Entries: **ALL**
- Print Routing Cards and/or Charge Cards? **N**

> **NOTE TO PRESENTER**: The file room prints Charge Cards, then pulls the record for each card, leaving the card in place of the file. Users may print cards at this time, or later when they print the Pull List.

- Print entries:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

- Return to the Batch Record Creation Menu.

Practice - This objective is practiced in Practice 3.

■ DELETE ENTRIES FROM THE BATCH LIST

Scenario: *You discover that a patient does not have a file. You must delete this patient from the Batch List so that a medical record is not created.*

DISCUSS BATCH EDITING

Once the Batch List is printed, it may be used to verify against the records on the shelf.

Batch List entries that do not have a record on the shelf can not be charged-out. Do not create a medical record for these entries.

- Access the Delete Entries from Batch (EB) option on the Batch Record Creation Menu.

  PAD System Menu → MRM → PL → **BR** → EB

- Select a Batch List: **CARDIOLOGY**
- List the entries to print: **ALL**
- Select the entry to delete: **CARLTON,CHARLES**

  Use the **down-arrow** key to position the cursor by the patient.

  When the cursor is positioned, press **<Select>**.

  Activate the selection by pressing **<Return>**.

- Verify that you want to delete the selected entry: NO// **Y**

  The system returns to the Batch Record Creation Menu.

Practice - This objective is practiced in Practice 3.

■ CREATE RECORDS FROM A BATCH LIST

Scenario: *You have verified the names against the records on your shelf for the Cardiology Batch List. You can now create records for the names on that Batch List.*

The system automatically creates records and prints labels using the Create Records from Batch option.

An entry for the newly created record:

– Is added to the Pull List for the corresponding clinic/date, if the Pull List exists.

– Creates a Pull List for the corresponding clinic/date, if the Pull List does not exist.

This allows for all records to be charged-out at one time. This will be covered in more detail in Module 3.

- Access the Create Records from Batch (CR) option on the Batch Record Creation Menu.

  PAD System Menu → MRM → PL → **BR** → CR

- Enter the Batch List: **CARDIOLOGY**
- Enter the Record Label Printer: **NL:**
- Return to the Medical Records Menu.

INQUIRE INTO PATIENT'S RECORD

New medical records have been created for patient(s) who appeared on the Batch List Print.

- Access the Record Inquiry (RI) option on the Record Information Menu.

  PAD System Menu → **MRM** → IN → RI

- Select Division: **<Return>**
- Select Patient Name: **DELAFIELD,BOYD**
- Confirm patient name: **<Return>**
- Indicate which information to display: ALL// **<Return>**

- Display the record:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

- Return to the Medical Records Menu.

Practice 3 - Process a Batch List.

■ PRINT A PULL LIST

Scenario: *You have created the Batch List. You now need to continue the process and print the Pull List you have just created for Cardiology.*

- Refer to Reference Manual, Procedure Flow Charts: Create Pull List, and review process.
- Access the Print Pull List(s) (PT) option on the Pull List Functions Menu.

  PAD System Menu → **MRM** → PL → PT

  Note the system display of division for which Pull Lists are available.

- Select Pull List: **??** (to display a picklist).
- Enter Pull List: **CARDIOLOGY CLINIC**
- Sort the Pull List: **??** (to display a picklist).
- Sort the Pull List: **C** (for clinic name).
- Select Type of List: **??** (to display a picklist).
- Verify that you want to include all appointments: ALL// **<Return>**
- Enter at Print Routing Cards and/or Charge Cards: BOTH// **N**
- Select Pull List Printer: **WIDE**
- Return to the Pull List Functions Menu.

❑ CANCEL REQUEST FROM PULL LIST

Scenario: *After checking for the availability of records on the list, you discover a Missing file. Cancel that request from the Pull List. Then print the Pull List to show the effect of the cancel.*

- Access the Cancel Request from Pull List (FR) option on the Pull List Functions Menu.

  PAD System Menu → MRM → **PL** → FR

- Enter the Pull List: **CARDIOLOGY**
- Select Request: **??** (to display a picklist).

- Select Request: **2** (SHAW,FLORENCE)
- Select Request: **<Return>**
- Verify that you want to cancel the request for patient Florence Shaw: NO// **Y**
- Remain at the Pull List Functions Menu.

Practice - This objective is practiced in Practice 4.

■ CHARGE-OUT A PULL LIST

Scenario: *You have verified the Pull List against your files. With one exception, your list is correct. Designate that request as Unfillable and charge-out the Pull List.*

- Access the Charge-Out Pull List Records (OU) option on the Pull List Functions Menu.

  PAD System Menu → MRM → **PL** → OU

- Designate a request as Not Fillable: NO// **Y**
- Enter the Request: **1** (NEEB,ALTHEA)
- Verify that you want to change the status to Not Fillable: **<Return>**
- Select Request: **<Return>**
- Enter Pull List: **CARDIOLOGY CLINIC**
- Verify that this record is not to be charged out to a holding area: NO// **<Return>**
- Verify that you want to charge-out records: NO// **Y**
- Enter Device: **WIDE**
- Return to the Pull List Functions Menu.
- Access the Print Pull List(s) (PT) option on the Pull List Functions Menu.

  PAD System Menu → MRM → **PL** → PT

- Enter Pull List: **CARDIOLOGY CLINIC**
- Sort the Pull List: **C** (for clinic name)
- Verify that you want to include all types: ALL// **<Return>**
- Bypass printing Routing Cards and/or Charge Cards: **N**
- Print the Pull List to the screen:

  Device: **WIDE**

  Right Margin: **WIDE**

- Return to the PAD System Menu.
- Refer to Reference Manual, Procedure Flow Chart: Create Pull List, and review Pull List functions.

Practice 4 - Process a Pull List.

IV. CLOSURE

Do you have any questions about the concepts covered in Module 1 - Basic Record Room Functions?

In summary, the following content was presented:

– Creating new records.

– Charging-out records.

– Checking-in records.

– Flagging a record as Missing and removing Missing flag.

– Processing Batch List records and Pull Lists.

Remember that Procedure Flowcharts, Menu Diagrams and Definitions, Quick Reference Guides, output samples, and a Subsystem Glossary are included in the Reference Manual, and may be used to complete the Master Practice.

This concludes Module 1. You now have the opportunity to demonstrate proficiency in the topics or skills presented.

Following the Master Practice, there will be a 10-minute break for those who will participate in the next module.

Please complete the Class Critique before leaving the classroom.

Thank you for attending.

Master Practice - Module 1.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Section 2. Practices

PRACTICE GUIDELINES

The information you need to complete each practice is supplied in the instructions, scenarios, and associated data cards. Data cards are found in Section 4 of the Student Guide.

Notify the presenter when directed to do so in the practice. This allows the presenter to verify that you have successfully completed an activity.

You may use any reference materials available in the classroom to complete your practices.

You may ask questions or request assistance at any time during the practices.

Device identifiers are site-specific, and will be provided by the presenter.

Refer to your data cards for any specific information that is required, but not listed within the practice scenario or listed data.

Information is only specified for those fields and prompts which require specific data entry. To advance past fields/prompts which are not specified, enter data you know to be correct, or press <Return>.

The practices for this module must be completed in the order in which they are presented. Please complete all parts of each practice before proceeding.

> **NOTE TO PRESENTER:** Tell students whether they may write in their Student Guides while performing the practices/Master Practice. If the Student Guides must be used for another class session, you may not want students to write in their documents.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Practice 1 - Create outpatient records and print labels.

INSTRUCTIONS: You have approximately 10 minutes to complete this practice.

Scenario: *A patient's records have been turned in to the facility. Outpatient records are required before this patient can start physical therapy. Before you create the record, you notice that the contents are greater than one volume. You decide to create a second volume.*

Note: Be certain to record the record number for each volume on the Data Cards provided by the presenter.

Access the Create a Label/Record/Volume (CV) option.

Create outpatient records.

Notify the presenter to verify that the outpatient record has been created. Do not print labels or routing/charge cards for either volume.

Scenario: *The Record Room label printer was out of labels when you created Volume 1. You have just loaded a new roll in the printer and you now need to print the label for Volume 1.*

Print a label for Volume 1 to the screen.

Pause when the label displays.

Notify the presenter to verify the data.

Do not print routing or charge cards.

Return to the Transaction Menu.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Practice Evaluation Criteria

Practice 1 - Create outpatient records and print labels.

Verify that students have created two volumes and have printed the labels to their screens.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Practice 2 - Charge-out and check-in records and inquire into a patient's record. Flag a record as Missing and remove Missing flag.

INSTRUCTIONS: You have approximately 10 minutes to complete this practice.

Scenario: *The doctor wants to review the patient's medical information and has sent the clerk to pick up the patient's record. While looking for the records, you notice that Volume 1 is not in the Record Room and there is no associated Charge Card/Loan label.*

a. Charge-out a Record

Access the Charge-Out Record (OT) option.

Select Borrower: **[borrower]**

Charge-out Volume 2.

Notify the presenter to verify that Volume 2 is charged-out to Urology.

Return to the Transaction Menu.

b. Flag a Record as Missing

Access the Flag Record as Missing (FR) option.

Flag Volume 1 as missing.

Notify the presenter to verify that Volume 1 is missing.

Return to the Transaction Menu.

c. Check-in a Record

Scenario: *The doctor has reviewed the patient's medical information and has determined that a consultation is required from an off-site facility. Check-in the record.*

Access the Check-In Record (IN) option.

Check-in Volume 2.

Notify the presenter to verify that Volume 2 is checked in.

Return to the Transaction Menu.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Practice 2 (continued)

d. Check-out a Record to a Patient

Scenario: *The patient has arrived at the Record Room to get her records before leaving for the consultation. She says that she has had Volume 1 since her last offsite appointment.*

Access the Patient Check-out (PC) option.

Remove the Missing flag from Volume 1 as you check-out both volumes to the patient.

Return to the Medical Records Menu.

Access the Record Inquiry (RI) option on the Record Information Menu.

Notify the presenter to verify that the Missing flag has been removed from Volume 1, and both volumes are checked-out to a patient.

Return to the Medical Records Menu.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Practice Evaluation Criteria

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

Verify that students have charged-out a record, flagged a record as Missing, checked the record back in, and removed the Missing flag.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Practice 3 - Process a Batch List.

INSTRUCTIONS: You have approximately 5 minutes to complete this practice.

Scenario: *Part of your tasking is to ensure that all patients have records in the system before they are pulled. You want to print the Batch List to ensure records are created.*

Access the Create Batch and Pull Lists from Schedules (IN) option on the Batch Record Creation Menu.

Select the Clinic and Pull Date listed on the data card.

Notify the presenter to verify that the Batch List has been processed.

Access the Print Batch List (PP) option.

Do not print routing or charge cards.

Print the Batch List to your screen.

Notify the presenter to verify that the Batch List is displayed on your screen.

Access the Create Records from Batch (CR) option.

Select the Clinic Name of the Batch List you have just processed.

Select Record Label Printer: **NL:**

Notify the presenter to verify that records have been created from the Batch List.

Return to the Pull List Functions Menu.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Practice Evaluation Criteria

Practice 3 - Process a Batch List.

Verify that students have created records for a Batch List.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Practice 4 - Process a Pull List.

INSTRUCTIONS: You have approximately 5 minutes to complete this practice.

Scenario: *Once you have verified that the records were created, you need to print a Pull List, then charge-out records to the clinic holding area.*

Access the Print Pull List(s) (PT) option.

Select the Pull List Clinic listed on the data card.

Do not print routing or charge cards.

Print the Pull List to your screen.

Notify the presenter to verify that the Pull List has been processed.

Access the Charge-Out Pull List Records (OU) option.

Do not designate any request as 'not fillable.'

Charge-out records to the clinic holding area.

Device: **<Return>**
Right Margin: 80// **<Return>**

Notify the presenter to verify that the Pull List has been charged-out.

Return to the Medical Records Menu.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Practice Evaluation Criteria

Practice 4 - Process a Pull List.

Verify that students have processed the Pull List and that the records have been checked-out to the holding area.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Section 3. Master Practice

MASTER PRACTICE GUIDELINES

This Master Practice enables the presenter to verify that you have successfully completed the objectives for this module.

The information you need to complete the Master Practice is supplied in the instructions, scenarios, and associated data cards. Data cards are found in Section 4 of the Student Guide.

You may use any reference materials available in the classroom to complete the Master Practice.

Device identifiers are site-specific, and will be provided by the presenter.

Unless otherwise directed by the presenter, please work alone to complete the Master Practice.

Notify the presenter when directed to do so in the Master Practice. This allows the presenter to verify that you have successfully completed an activity.

Information is only specified for those fields and prompts which require specific data entry. To advance past fields/prompts which are not specified, enter data you know to be correct, or press <Return>.

The components of the Master Practice should be completed in the order in which they are presented.

You have approximately 40 minutes to complete this Master Practice.

> **NOTE TO PRESENTER:** Tell students whether they may write in their Student Guides while performing the practices/Master Practice. If the Student Guides must be used for another class session, you may not want students to write in their documents.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Scenario 1 - Create outpatient volumes.

INSTRUCTIONS: No additional instructions are required.

Scenario: *A patient has registered with your MTF and given you his/her overflowing medical record from the previous MTF. You need to create an outpatient record for this patient and split it into two volumes.*

> **Note:** Record the record number for each volume on the Data Cards provided by the presenter.
>
> Create an outpatient record and Volume 2 for the record.
>
> Do not print labels or routing/charge cards.

Notify the presenter to verify that the record and Volume 2 are created.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Scenario 2 - Check-out records.

INSTRUCTIONS: No additional instructions are required.

Scenario: *A physician in Cardiology wants another look at the patient's record before a scheduled phone consultation with the Cardiologist at the previous MTF. She has sent the department clerk to pick up the records.*

Select Cardiology Clinic as the Borrower.

Check-out Volume 2.

Notify the presenter to verify that the record is charged-out to Cardiology.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Scenario 3 - Flag a record as Missing.

INSTRUCTIONS: No additional instructions are required.

Scenario: *When the patient requests his/her records, you discover they are both gone, with a Charge Card on the shelf for Volume 2 only. Flag Volume 1 as Missing.*

Flag a record as Missing.

Complete the Supervisor Comments:

LAST CHARGED-OUT TO CARDIOLOGY CLINIC

Notify the presenter to verify the message that the record has been flagged as Missing.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Scenario 4 - Remove a Missing flag and check-in a record.

INSTRUCTIONS: No additional instructions are required.

Scenario: *When the Cardiology clerk returns both volumes of the patient's record, you are notified that Volume 1 had been flagged as Missing. You need to remove the Missing flag from Volume 1 as you check-in both volumes.*

Remove a Missing flag as you check-in records.

Complete the Finding Missing Records Screen:

Where was Record Found: **CARDIOLOGY CLINIC**

Reason: **CHARGED TO WRONG BORROWER**

Supervisor Comments: **RETURNED BY CARDIOLOGY CLINIC**

Notify the presenter to verify that the records are checked-in to the Record Room.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Scenario 5 - Check-out records to a patient.

INSTRUCTIONS: No additional instructions are required.

Scenario: *The patient needs his/her records for an off-site consultation. Check-out both volumes in the patient's name.*

Check-out the records to the patient.

Notify the presenter to verify that the record is checked-out to the patient.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Scenario 6 - Inquire about a patient’s record.

INSTRUCTIONS: No additional instructions are required.

Scenario: *A doctor in Cardiology has once again requested the patient’s records. There is no Charge Card in the slot and you don’t know where the records are. You need to inquire about a patient’s record for its current location.*

Inquire about a patient's record.

Notify the presenter when the Record Inquiry displays on the screen.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Scenario 7 - Process the Batch List.

INSTRUCTIONS: No additional instructions are required.

Scenario: *Process the Batch List for Monday. This list is for Tuesday appointments.*

Create a Batch and Pull List from Schedules.

Select the Clinic, Pull Date, and Batch List Printer listed on the data card.

Print the Batch List to your screen.

Do not print routing or charge cards.

Notify the presenter to verify that the Batch List has been processed.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Scenario 8 - Process the Pull List and charge-out records.

INSTRUCTIONS: No additional instructions are required.

Scenario: *You have just finished the Batch List process for the records needed for the appointments next Tuesday. You now need to process the Pull List and charge-out the records to the holding area.*

Display the Pull List on your screen.

Do not print routing or charge cards.

Notify the presenter to verify that the Pull List has been processed.

Charge-out the Pull List records to the clinic holding area.

Do not designate any requests as 'not fillable.'

Notify the presenter to verify that the Pull List has been charged-out.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Master Practice Evaluation Criteria

Scenario 1 - Create outpatient volumes.

Verify that the students have created two volumes. Use the Record Inquiry (RI) option to view the records.

Scenario 2 - Check-out records.

Verify that the records have been checked-out. Use the Record Inquiry (RI) option to view that the records have been checked-out.

Scenario 3 - Flag a record as Missing.

Verify that the records have been flagged as Missing. Use the Record Inquiry (RI) option to view the flagged record.

Scenario 4 - Remove a Missing flag and check-in a record.

Verify that the Missing flag has been removed and the records have been checked-in. Use the Record Inquiry (RI) option to view that the records have been checked-in.

Scenario 5 - Check-out records to a patient.

Verify that the records have been checked-out to the patient. Use the Record Inquiry (RI) option to view that the records have been checked-out.

Scenario 6 - Inquire about a patient's record.

Verify the location of the patient's record. View the record as it displays.

Scenario 7 - Process the Batch List.

Verify the creation of records for the Batch List.

Scenario 8 - Process the Pull List and charge-out records.

Verify that the Pull List has been processed and that the records have been checked-out to the holding area.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Section 4. Data Cards

Presenter

Username:	**TRAINING**	Access:	**MRTRT**
Password:		Verify:	**MRTRTV**
Area:	**A**		

PRESENTER'S DEMONSTRATION DATA

All required information is contained in the Module Outline.

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 1

Username:	**TRAINING**	Access:	**MRTRTA**
Password:		Verify:	**MRTRTAV**
Area:	**A**		

Practices:

Practice 1 - Create outpatient records and print labels.

Patient Name: **PARDEE,BETH**
FMP/SSN: **30/101-10-0070**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

a. Charge-out a Record

Borrower: **UROLOGY**

b. Flag a Record as Missing

Supervisor Comments: **LAST SEEN IN CODING**

c. Check-in a Record

All information is contained in the practice.

d. Check-out a Record to a Patient

Where record was found: **CHARGED TO PATIENT**
Reason: **HELD BY PATIENT**
Supervisor Comments: **VERIFIED - RECORD CHARGED-OUT TO PATIENT**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 1 (continued)

Practice 3 - Process a Batch List.

Clinic: **ENDOCRINOLOGY CLINIC**
Pull Date: **06/25**
Batch List Printer: **CHDEVICE**

Practice 4 - Process a Pull List.

Pull List: **ENDOCRINOLOGY CLINIC**

Master Practice:

Scenario 1 - Create outpatient volumes.

Patient Name: **PARDEE,CHAD**
FMP/SSN: **01/101-10-0070**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Scenario 2 - Check-out records.

Patient Name: **PARDEE,CHAD**
FMP/SSN: **01/101-10-0070**

Scenario 3 - Flag a record as Missing.

Patient Name: **PARDEE,CHAD**
FMP/SSN: **01/101-10-0070**

Scenario 4 - Remove a Missing flag and check-in a record.

Patient Name: **PARDEE,CHAD**
FMP/SSN: **01/101-10-0070**

Scenario 5 - Check-out records to a patient.

Patient Name: **PARDEE,CHAD**
FMP/SSN: **01/101-10-0070**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 1 (continued)

Scenario 6 - Inquire about a patient's record.

Patient Name: **PARDEE,CHAD**
FMP/SSN: **01/101-10-0070**

Scenario 7 - Process the Batch List.

Clinic: **ENDOCRINOLOGY CLINIC**
Pull Date: **06/26**
Batch List Printer: **CHDEVICE**

Scenario 8 - Process the Pull List and charge-out records.

Clinic: **ENDOCRINOLOGY CLINIC**
Pull Date: **06/26**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 2

Username:	**TRAINING**	Access:	**MRTRTB**
Password:		Verify:	**MRTRTBV**
Area:	**A**		

Practices:

Practice 1 - Create outpatient records and print labels.

Patient Name: **PARDINI,ELLIE**
FMP/SSN: **30/101-10-0001**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

a. Charge-out a Record

Borrower: **UROLOGY**

b. Flag a Record as Missing

Supervisor Comments: **LAST SEEN IN CODING**

c. Check-in a Record

All information is contained in the practice.

d. Check-out a Record to a Patient

Where record was found: **CHARGED TO PATIENT**
Reason: **HELD BY PATIENT**
Supervisor Comments: **VERIFIED - RECORD CHARGED-OUT TO PATIENT**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 2 (continued)

Practice 3 - Process a Batch List.

Clinic: **GYNECOLOGY CLINIC**
Pull Date: **06/25**
Batch List Printer: **CHDEVICE**

Practice 4 - Process a Pull List.

Pull List: **GYNECOLOGY CLINIC**

Master Practice:

Scenario 1 - Create outpatient volumes.

Patient Name: **PARDINI,FRANK**
FMP/SSN: **01/101-10-0001**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Scenario 2 - Check-out records.

Patient Name: **PARDINI,FRANK**
FMP/SSN: **01/101-10-0001**

Scenario 3 - Flag a record as Missing.

Patient Name: **PARDINI,FRANK**
FMP/SSN: **01/101-10-0001**

Scenario 4 - Remove a Missing flag and check-in a record.

Patient Name: **PARDINI,FRANK**
FMP/SSN: **01/101-10-0001**

Scenario 5 - Check-out records to a patient.

Patient Name: **PARDINI,FRANK**
FMP/SSN: **01/101-10-0001**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 2 (continued)

Scenario 6 - Inquire about a patient's record.

Patient Name: **PARDINI,FRANK**
FMP/SSN: **01/101-10-0001**

Scenario 7 - Process the Batch List.

Clinic: **GYNECOLOGY CLINIC**
Pull Date: **06/26**
Batch List Printer: **CHDEVICE**

Scenario 8 - Process the Pull List and charge-out records.

Clinic: **GYNECOLOGY CLINIC**
Pull Date: **06/26**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 3

Username:	**TRAINING**	Access:	**MRTRTC**
Password:		Verify:	**MRTRTCV**
Area:	**A**		

Practices:

Practice 1 - Create outpatient records and print labels.

Patient Name: **PARKER,HELEN**
FMP/SSN: **30/101-10-0010**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

a. Charge-out a Record

Borrower: **UROLOGY**

b. Flag a Record as Missing

Supervisor Comments: **LAST SEEN IN CODING**

c. Check-in a Record

All information is contained in the practice.

d. Check-out a Record to a Patient

Where record was found: **CHARGED TO PATIENT**
Reason: **HELD BY PATIENT**
Supervisor Comments: **VERIFIED - RECORD CHARGED-OUT TO PATIENT**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 3 (continued)

Practice 3 - Process a Batch List.

Clinic: **INTERNAL MEDICINE CLINIC**
Pull Date: **06/24**
Batch List Printer: **CHDEVICE**

Practice 4 - Process a Pull List.

Pull List: **INTERNAL MEDICINE CLINIC**

Master Practice:

Scenario 1 - Create outpatient volumes.

Patient Name: **PARKER,IVAN**
FMP/SSN: **01/101-10-0010**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Scenario 2 - Check-out records.

Patient Name: **PARKER,IVAN**
FMP/SSN: **01/101-10-0010**

Scenario 3 - Flag a record as Missing.

Patient Name: **PARKER,IVAN**
FMP/SSN: **01/101-10-0010**

Scenario 4 - Remove a Missing flag and check-in a record.

Patient Name: **PARKER,IVAN**
FMP/SSN: **01/101-10-0010**

Scenario 5 - Check-out records to a patient.

Patient Name: **PARKER,IVAN**
FMP/SSN: **01/101-10-0010**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 3 (continued)

Scenario 6 - Inquire about a patient's record.

Patient Name: **PARKER,IVAN**
FMP/SSN: **01/101-10-0010**

Scenario 7 - Process the Batch List.

Clinic: **INTERNAL MEDICINE CLINIC**
Pull Date: **06/25**
Batch List Printer: **CHDEVICE**

Scenario 8 - Process the Pull List and charge-out records.

Clinic: **INTERNAL MEDICINE CLINIC**
Pull Date: **06/25**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 4

Username:	**TRAINING**	Access:	**MRTRTD**
Password:		Verify:	**MRTRTDV**
Area:	**A**		

Practices:

Practice 1 - Create outpatient records and print labels.

Patient Name: **PARNELL,KRISTIN**
FMP/SSN: **30/101-10-0015**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

a. Charge-out a Record

Borrower: **UROLOGY**

b. Flag a Record as Missing

Supervisor Comments: **LAST SEEN IN CODING**

c. Check-in a Record

All information is contained in the practice.

d. Check-out a Record to a Patient

Where record was found: **CHARGED TO PATIENT**
Reason: **HELD BY PATIENT**
Supervisor Comments: **VERIFIED - RECORD CHARGED-OUT TO PATIENT**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 4 (continued)

Practice 3 - Process a Batch List.

Clinic: **GASTROENTEROLOGY CLINIC**
Pull Date: **06/24**
Batch List Printer: **CHDEVICE**

Practice 4 - Process a Pull List.

Pull List: **GASTROENTEROLOGY CLINIC**

Master Practice:

Scenario 1 - Create outpatient volumes.

Patient Name: **PARNELL,LANCE**
FMP/SSN: **01/101-10-0015**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Scenario 2 - Check-out records.

Patient Name: **PARNELL,LANCE**
FMP/SSN: **01/101-10-0015**

Scenario 3 - Flag a record as Missing.

Patient Name: **PARNELL,LANCE**
FMP/SSN: **01/101-10-0015**

Scenario 4 - Remove a Missing flag and check-in a record.

Patient Name: **PARNELL,LANCE**
FMP/SSN: **01/101-10-0015**

Scenario 5 - Check-out records to a patient.

Patient Name: **PARNELL,LANCE**
FMP/SSN: **01/101-10-0015**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 4 (continued)

Scenario 6 - Inquire about a patient's record.

Patient Name: **PARNELL,LANCE**
FMP/SSN: **01/101-10-0015**

Scenario 7 - Process the Batch List.

Clinic: **GASTROENTEROLOGY CLINIC**
Pull Date: **06/25**
Batch List Printer: **CHDEVICE**

Scenario 8 - Process the Pull List and charge-out records.

Clinic: **GASTROENTEROLOGY CLINIC**
Pull Date: **06/25**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 5

Username:	**TRAINING**	Access:	**MRTRTE**
Password:		Verify:	**MRTRTEV**
Area:	**A**		

Practices:

Practice 1 - Create outpatient records and print labels.

Patient Name: **PARSLEY,NANCY**
FMP/SSN: **30/101-10-0020**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

a. Charge-out a Record

Borrower: **UROLOGY**

b. Flag a Record as Missing

Supervisor Comments: **LAST SEEN IN CODING**

c. Check-in a Record

All information is contained in the practice.

d. Check-out a Record to a Patient

Where record was found: **CHARGED TO PATIENT**
Reason: **HELD BY PATIENT**
Supervisor Comments: **VERIFIED - RECORD CHARGED-OUT TO PATIENT**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 5 (continued)

Practice 3 - Process a Batch List.

Clinic: **ONCOLOGY CLINIC**
Pull Date: **06/24**
Batch List Printer: **CHDEVICE**

Practice 4 - Process a Pull List.

Pull List: **ONCOLOGY CLINIC**

Master Practice:

Scenario 1 - Create outpatient volumes.

Patient Name: **PARSLEY,OTTO**
FMP/SSN: **01/101-10-0020**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Scenario 2 - Check-out records.

Patient Name: **PARSLEY,OTTO**
FMP/SSN: **01/101-10-0020**

Scenario 3 - Flag a record as Missing.

Patient Name: **PARSLEY,OTTO**
FMP/SSN: **01/101-10-0020**

Scenario 4 - Remove a Missing flag and check-in a record.

Patient Name: **PARSLEY,OTTO**
FMP/SSN: **01/101-10-0020**

Scenario 5 - Check-out records to a patient.

Patient Name: **PARSLEY,OTTO**
FMP/SSN: **01/101-10-0020**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 5 (continued)

Scenario 6 - Inquire about a patient's record.

Patient Name: **PARSLEY,OTTO**
FMP/SSN: **01/101-10-0020**

Scenario 7 - Process the Batch List.

Clinic: **ONCOLOGY CLINIC**
Pull Date: **06/25**
Batch List Printer: **CHDEVICE**

Scenario 8 - Process the Pull List and charge-out records.

Clinic: **ONCOLOGY CLINIC**
Pull Date: **06/25**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 6

Username:	**TRAINING**	Access:	**MRTRTF**
Password:		Verify:	**MRTRTFV**
Area:	**A**		

Practices:

Practice 1 - Create outpatient records and print labels.

Patient Name: **PARSONS,PAULA**
FMP/SSN: **30/101-10-0025**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

a. Charge-out a Record

Borrower: **UROLOGY**

b. Flag a Record as Missing

Supervisor Comments: **LAST SEEN IN CODING**

c. Check-in a Record

All information is contained in the practice.

d. Check-out a Record to a Patient

Where record was found: **CHARGED TO PATIENT**
Reason: **HELD BY PATIENT**
Supervisor Comments: **VERIFIED - RECORD CHARGED-OUT TO PATIENT**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 6 (continued)

Practice 3 - Process a Batch List.

Clinic: **ORTHOPEDIC CLINIC**
Pull Date: **06/24**
Batch List Printer: **CHDEVICE**

Practice 4 - Process a Pull List.

Pull List: **ORTHOPEDIC CLINIC**

Master Practice:

Scenario 1 - Create outpatient volumes.

Patient Name: **PARSONS,RANDY**
FMP/SSN: **01/101-10-0025**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Scenario 2 - Check-out records.

Patient Name: **PARSONS,RANDY**
FMP/SSN: **01/101-10-0025**

Scenario 3 - Flag a record as Missing.

Patient Name: **PARSONS,RANDY**
FMP/SSN: **01/101-10-0025**

Scenario 4 - Remove a Missing flag and check-in a record.

Patient Name: **PARSONS,RANDY**
FMP/SSN: **01/101-10-0025**

Scenario 5 - Check-out records to a patient.

Patient Name: **PARSONS,RANDY**
FMP/SSN: **01/101-10-0025**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 6 (continued)

Scenario 6 - Inquire about a patient's record.

Patient Name: **PARSONS,RANDY**
FMP/SSN: **01/101-10-0025**

Scenario 7 - Process the Batch List.

Clinic: **ORTHOPEDIC CLINIC**
Pull Date: **06/25**
Batch List Printer: **CHDEVICE**

Scenario 8 - Process the Pull List and charge-out records.

Clinic: **ORTHOPEDIC CLINIC**
Pull Date: **06/25**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 7

Username:	**TRAINING**	Access:	**MRTRTG**
Password:		Verify:	**MRTRTGV**
Area:	**A**		

Practices:

Practice 1 - Create outpatient records and print labels.

Patient Name: **PARTON,TRACY**
FMP/SSN: **30/101-10-0030**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

a. Charge-out a Record

Borrower: **UROLOGY**

b. Flag a Record as Missing

Supervisor Comments: **LAST SEEN IN CODING**

c. Check-in a Record

All information is contained in the practice.

d. Check-out a Record to a Patient

Where record was found: **CHARGED TO PATIENT**
Reason: **HELD BY PATIENT**
Supervisor Comments: **VERIFIED - RECORD CHARGED-OUT TO PATIENT**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 7 (continued)

Practice 3 - Process a Batch List.

Clinic: **PEDIATRIC CLINIC**
Pull Date: **06/24**
Batch List Printer: **CHDEVICE**

Practice 4 - Process a Pull List.

Pull List: **PEDIATRIC CLINIC**

Master Practice:

Scenario 1 - Create outpatient volumes.

Patient Name: **PARTON,ANDREW**
FMP/SSN: **01/101-10-0030**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Scenario 2 - Check-out records.

Patient Name: **PARTON,ANDREW**
FMP/SSN: **01/101-10-0030**

Scenario 3 - Flag a record as Missing.

Patient Name: **PARTON,ANDREW**
FMP/SSN: **01/101-10-0030**

Scenario 4 - Remove a Missing flag and check-in a record.

Patient Name: **PARTON,ANDREW**
FMP/SSN: **01/101-10-0030**

Scenario 5 - Check-out records to a patient.

Patient Name: **PARTON,ANDREW**
FMP/SSN: **01/101-10-0030**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 7 (continued)

Scenario 6 - Inquire about a patient's record.

Patient Name: **PARTON,ANDREW**
FMP/SSN: **01/101-10-0030**

Scenario 7 - Process the Batch List.

Clinic: **PEDIATRIC CLINIC**
Pull Date: **06/25**
Batch List Printer: **CHDEVICE**

Scenario 8 - Process the Pull List and charge-out records.

Clinic: **PEDIATRIC CLINIC**
Pull Date: **06/25**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 8

Username:	**TRAINING**	Access:	**MRTRTH**
Password:		Verify:	**MRTRTHV**
Area:	**A**		

Practices:

Practice 1 - Create outpatient records and print labels.

Patient Name: **PARROT,WENDY**
FMP/SSN: **30/101-10-0035**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

a. Charge-out a Record

Borrower: **UROLOGY**

b. Flag a Record as Missing

Supervisor Comments: **LAST SEEN IN CODING**

c. Check-in a Record

All information is contained in the practice.

d. Check-out a Record to a Patient

Where record was found: **CHARGED TO PATIENT**
Reason: **HELD BY PATIENT**
Supervisor Comments: **VERIFIED - RECORD CHARGED-OUT TO PATIENT**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 8 (continued)

Practice 3 - Process a Batch List.

Clinic: **PULMONARY DISEASE CLINIC**
Pull Date: **06/24**
Batch List Printer: **CHDEVICE**

Practice 4 - Process a Pull List.

Pull List: **PULMONARY DISEASE CLINIC**

Master Practice:

Scenario 1 - Create outpatient volumes.

Patient Name: **PARROT,BRIAN**
FMP/SSN: **01/101-10-0035**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Scenario 2 - Check-out records.

Patient Name: **PARROT,BRIAN**
FMP/SSN: **01/101-10-0035**

Scenario 3 - Flag a record as Missing.

Patient Name: **PARROT,BRIAN**
FMP/SSN: **01/101-10-0035**

Scenario 4 - Remove a Missing flag and check-in a record.

Patient Name: **PARROT,BRIAN**
FMP/SSN: **01/101-10-0035**

Scenario 5 - Check-out records to a patient.

Patient Name: **PARROT,BRIAN**
FMP/SSN: **01/101-10-0035**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 8 (continued)

Scenario 6 - Inquire about a patient's record.

Patient Name: **PARROT,BRIAN**
FMP/SSN: **01/101-10-0035**

Scenario 7 - Process the Batch List.

Clinic: **PULMONARY DISEASE CLINIC**
Pull Date: **06/25**
Batch List Printer: **CHDEVICE**

Scenario 8 - Process the Pull List and charge-out records.

Clinic: **PULMONARY DISEASE CLINIC**
Pull Date: **06/25**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 9

Username:	**TRAINING**	Access:	**MRTRTI**
Password:		Verify:	**MRTRTIV**
Area:	**A**		

Practices:

Practice 1 - Create outpatient records and print labels.

Patient Name: **PARENT,DIANE**
FMP/SSN: **30/101-10-0040**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

a. Charge-out a Record

Borrower: **UROLOGY**

b. Flag a Record as Missing

Supervisor Comments: **LAST SEEN IN CODING**

c. Check-in a Record

All information is contained in the practice.

d. Check-out a Record to a Patient

Where record was found: **CHARGED TO PATIENT**
Reason: **HELD BY PATIENT**
Supervisor Comments: **VERIFIED - RECORD CHARGED-OUT TO PATIENT**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 9 (continued)

Practice 3 - Process a Batch List.

Clinic: **RHEUMATOLOGY CLINIC**
Pull Date: **06/24**
Batch List Printer: **CHDEVICE**

Practice 4 - Process a Pull List.

Pull List: **RHEUMATOLOGY CLINIC**

Master Practice:

Scenario 1 - Create outpatient volumes.

Patient Name: **PARENT,ERNEST**
FMP/SSN: **01/101-10-0040**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Scenario 2 - Check-out records.

Patient Name: **PARENT,ERNEST**
FMP/SSN: **01/101-10-0040**

Scenario 3 - Flag a record as Missing.

Patient Name: **PARENT,ERNEST**
FMP/SSN: **01/101-10-0040**

Scenario 4 - Remove a Missing flag and check-in a record.

Patient Name: **PARENT,ERNEST**
FMP/SSN: **01/101-10-0040**

Scenario 5 - Check-out records to a patient.

Patient Name: **PARENT,ERNEST**
FMP/SSN: **01/101-10-0040**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 9 (continued)

Scenario 6 - Inquire about a patient's record.

Patient Name: **PARENT,ERNEST**
FMP/SSN: **01/101-10-0040**

Scenario 7 - Process the Batch List.

Clinic: **RHEUMATOLOGY CLINIC**
Pull Date: **06/25**
Batch List Printer: **CHDEVICE**

Scenario 8 - Process the Pull List and charge-out records.

Clinic: **RHEUMATOLOGY CLINIC**
Pull Date: **06/25**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 10

Username:	**TRAINING**	Access:	**MRTRTJ**
Password:		Verify:	**MRTRTJV**
Area:	**A**		

Practices:

Practice 1 - Create outpatient records and print labels.

Patient Name: **PARRIS,GRACE**
FMP/SSN: **30/101-10-0045**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Practice 2 - Charge-out and check-in records and inquire into a patient record. Flag a record as Missing and remove Missing flag.

a. Charge-out a Record

Borrower: **UROLOGY**

b. Flag a Record as Missing

Supervisor Comments: **LAST SEEN IN CODING**

c. Check-in a Record

All information is contained in the practice.

d. Check-out a Record to a Patient

Where record was found: **CHARGED TO PATIENT**
Reason: **HELD BY PATIENT**
Supervisor Comments: **VERIFIED - RECORD CHARGED-OUT TO PATIENT**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 10 (continued)

Practice 3 - Process a Batch List.

Clinic: **OBSTETRICS CLINIC**
Pull Date: **06/24**
Batch List Printer: **CHDEVICE**

Practice 4 - Process a Pull List.

Pull List: **OBSTETRICS CLINIC**

Master Practice:

Scenario 1 - Create outpatient volumes.

Patient Name: **PARRIS,HAROLD**
FMP/SSN: **01/101-10-0045**

OUTPATIENT VOL 1 Record Number ________________
OUTPATIENT VOL 2 Record Number ________________

Scenario 2 - Check-out records.

Patient Name: **PARRIS,HAROLD**
FMP/SSN: **01/101-10-0045**

Scenario 3 - Flag a record as Missing.

Patient Name: **PARRIS,HAROLD**
FMP/SSN: **01/101-10-0045**

Scenario 4 - Remove a Missing flag and check-in a record.

Patient Name: **PARRIS,HAROLD**
FMP/SSN: **01/101-10-0045**

Scenario 5 - Check-out records to a patient.

Patient Name: **PARRIS,HAROLD**
FMP/SSN: **01/101-10-0045**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Student 10 (continued)

Scenario 6 - Inquire about a patient's record.

Patient Name: **PARRIS,HAROLD**
FMP/SSN: **01/101-10-0045**

Scenario 7 - Process the Batch List.

Clinic: **OBSTETRICS CLINIC**
Pull Date: **06/25**
Batch List Printer: **CHDEVICE**

Scenario 8 - Process the Pull List and charge-out records.

Clinic: **OBSTETRICS CLINIC**
Pull Date: **06/25**

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Section 5. Reference Materials

Index

Quick Reference Guide **Page**

CREATE A RECORD

This option allows you to create a record in the Record Tracking system or create additional volumes for existing records.

MENU PATH: PAD ➔ MRM ➔ TM ➔ CV

```
ASK FOR HELP = HELP                    SCREEN EXIT = F10
                  *** MEDICAL RECORDS TRACKING PROFILE ***
                  Personal Data – Privacy Act of 1974 (PL 93-579)
======================================================================

Name:  PARR,ALLAN           (20/101-10-0060)        Birth Date:  19 Dec 1960
Ward:                                          Run Date:  21 Jun 2001@082939
======================================================================
                                                              Phone/
   Record Type     Vol   Current Borrower       Date Charged     Location#

1  OUTPATIENT      V3    MEDICAL RECORDS FI     21 Jun 2001@0828  4567/RM# 271
   FAMILY ADVOCACY)      (ADDAMS,HENRY W)
2  OUTPATIENT      V2    MEDICAL RECORDS FI     21 Jun 2001@0827  4567/RM# 271
3  OUTPATIENT      V1    MEDICAL RECORDS F1     21 Jun 2001@0824  4567/RM# 271
```

```
RECORDS:  PARR,ALAN                                     RT NEW RECORD ASK
======================================================================
PARR,ALLAN                    OUTPATIENT                Vol:  3
======================================================================
Home Location:  MEDICAL RECORDS FILE ROOM
Current Location:  MEDICAL RECORDS FILE ROOM
Associated Borrower:  ADDAMS,HENRY W
Content Descriptor:  FAMILY ADVOCACY
```

Need to know information:

- System either displays existing records or a message that no records exist in Medical Records Tracking and then prompts the user to create a new record or volume.

Additional volumes to Outpatient records only may be created. Inpatient volumes are created for each inpatient episode.

HOME LOCATION: Primary file room location. These locations need to be established in the record tracking system.

CURRENT LOCATION: Used to document that a record is currently checked out to another location (borrower).

SAMPLE BARCODE LABEL (Medical Record/Tracking)**:**

```
                    MEDICAL RECORDS FILE ROOM
                       OUTPATIENT RECORD
______________________________________________________________

Name:  PARR,ALLAN
SSN:  20/101-10-0060
DOB:  19 Dec 1944                        Sex:  MALE
Pt Category N11:                         Spon Grade/Rnk:  N02
Rec #:  374

 MEDICAL  RECORD



Vol #:  1

  *A2222/12345*
```

MRT **CREATE A RECORD**

CHARGE-OUT A RECORD

This option allows you to check out a record from its home location.

MENU PATH: PAD ➔ MRM ➔ TM ➔ OT

```
**** MEDICAL RECORD TRACKING ****
Folders Currently Charged to Borrower
--------------------------------------------------------------------------------
Borrower: JOHNSON,BEN                                   Page: 1
Phone/Location: 535-7147/BLDG 1          Run Date: 09 NOV 2001@165203
--------------------------------------------------------------------------------
Record Type  Vol    Medical Records    Charged Since...   Days  Overdue

Outpatient   V1     Jones, Tom         28 Sep 2001@1204     1

Inpatient    V1     Smith, Jackie      28 Sep 2001@1703     1

Press<Return>
```

```
Records Selected to be 'Charged Out' to 'Casey, Ben'
              Personal Data – Privacy Act of 1974 (PL-93-579)

Select Records
Deselect choice by pressing <Select>.
Selection will be processed when you enter a final <Return>.
```

```
**** MEDICAL RECORDS TRACKING PROFILE ****
Personal Data – Privacy Act of 1974 (PL 93-579)
--------------------------------------------------------------------------------
Name: CARTIER,JOHN     (20/455-23-1212)     Birth Date: 29 NOV 1957
Ward: INACTIVE                       Run Date: 09 NOV 2001@16523

                         Current
   Record Type  Vol      Borrower          Date Charged          Phone/Room#

*1 Outpatient   V1       Johnson, Ben      26 Oct 2001@1436       ----
   (Pull List: LAM^)

 2 Dental       V1       ---               02 Nov 2001@1453       ----
```

Need to know information:

- When selecting the borrower, use the following code before the name.

  P. - Provider
  W. - Ward
  L. - Location
  D. - Division
  M. - MTF
  N. - NonDOD MTF

- If a borrower is entered that is not in the borrower file, it can be entered at this time.
- To LAYGO borrower: user must have FileMan access “K.”
- After Select Borrower prompt, you may see a listing of all records that are currently charged out to the selected borrower.
- If set in the Record Tracking parameters, you may update the borrower's phone number and location.
- At the ‘charge out’ screen enter patient identifier for the record to be charged out.
- Select which records are to be charged out. The system displays current information regarding the selected record.
- You may continue selecting records to charge out or press <Return> to charge out selected record(s).

MRT **CHARGE-OUT A RECORD**

FLAG A RECORD AS MISSING

This option allows you to flag a record as missing when the record's physical location is not known.

MENU PATH: PAD ➔ MRM ➔ TM ➔ FR

```
**** MEDICAL RECORDS TRACKING PROFILE ****
Personal Data - Privacy Act of 1974 (PL 93-579)
------------------------------------------------------------------------------------
Name:  CARTIER,JOHN      (20/455-23-1212)      Birth Date:  29 NOV 1957
Ward:  CARDIOLOGY (I)                  Run Date:  16 NOV 2001@15114
------------------------------------------------------------------------------------
                         Current
   Record Type   Vol     Borrower              Date Charged         Phone/Room#

1  Outpatient    V1      Outpatient            18 Oct 2001@0856     1357/9999
   (^Comment)            Record
2  Inpatient     V1      Inpatient File Room
                                               16 Nov 2001@1436
   Date Created:  16 NOV 2001@1456     Reg. #:  12322
```

```
Are you sure you want to flag this 'Record' as missing? NO//
```

```
Missing Record Entry:  CARTIER,JOHN
------------------------------------------------------------------------------------
CARTIER,JOHN              OUTPATIENT                        Vol #:  2
------------------------------------------------------------------------------------
Supervisor Comments:
```

Need to know information:

- Supervisor can enter information regarding the circumstances that caused the record to be flagged as missing.
- Blank Current Borrower field shows that a record is missing.

MRT FLAG A RECORD AS MISSING

CHECK-IN A RECORD

This option allows you to check-in a record to its home location.

MENU PATH: PAD → MRM → TM → IN

```
Records Selected to be 'Checked-In' to 'OUTPATIENT FILE ROOM'
Personal - Privacy Act of 1974 (PL-93-579)
------------------------------------------------------------------------------------
Select Records
Deselect choice by pressing <Select>.
Selections will be processed when you enter a final <Return>
```

```
                 **** MEDICAL RECORDS TRACKING PROFILE ****
------------------------------------------------------------------------------------
Name:  CARTIER,JOHN      (20/455-23-1212)      Birth Date:  29 NOV 1957
Ward:  2B                          Run Date:  09 NOV 2001@1652
------------------------------------------------------------------------------------
                          Current
    Record Type  Vol      Borrower            Date Charged          Phone/Room#

*1  Outpatient    V1      Johnson, Ben        26 Oct 2001@1436
    (Pull List:  LAM^)      ---                                        ---

 2  Dental        V1        ---               02 Nov 2001@1453         ---
```

Need to know information:

- At the check-in screen, enter patient identifier for the record to be checked-in.
- Select which records are to be checked-in. You are provided with current information regarding the selected record.
- You may continue selecting records to check-in or press <Return> to check-in selected record(s).

REMOVE A MISSING FLAG

MENU PATH: PAD → MRM → TM → FR

```
                    **** MEDICAL RECORDS TRACKING PROFILE ****
                   Personal Data - Privacy Act of 1974 (PL 93-579)
-----------------------------------------------------------------------------
Name:  CARTIER,JOHN      (20/455-23-1212)          Birth Date:  29 NOV 1957
Ward:  CARDIOLOGY (I)                          Run Date:  16 NOV 2001@15140
-----------------------------------------------------------------------------
                          Current
   Record Type  Vol      Borrower           Date Charged          Phone/Room#

1  Outpatient    V2        ---              16 Nov 2001@1513        ---

   This 'Record' is already flagged as missing.

   Do you want to remove the 'missing' flag?  No//
```

```
Missing Records:  CARTIER,JOHN                FINDING MISSING RECORDS...
-----------------------------------------------------------------------------
CARTIER,JOHN         OUTPATIENT                              Vol #2
-----------------------------------------------------------------------------
Where was record found:
Reason:
User Comments:  28 SEP 01 - RECORD MISSING.
```

Need to know information:

- **WHERE WAS RECORD FOUND:** You need to enter borrower or location.
- **REASON:** Must be entered using specific reasons that are entered in the Medical Record Tracking parameters.
- **USER COMMENTS:** Person who found record can enter circumstances.*
- **SUPERVISOR COMMENTS:** Information only. Shows comments that were entered when the record was flagged as missing.*

* Which Comment field accessed depends on the user type: Supervisor or Clerk.

Note: The Missing Record flag can be removed at ANY movement menu option (i.e., Check-In, Charge-Out, Re-Charge, etc.)

MRT REMOVE A MISSING FLAG

PAD: RECORD TRACKING

Module 1 - Basic Record Room Functions

Section 6. Transparencies

There are no transparencies for this module.

PAD:
RECORD TRACKING

Module 2 -
Basic Inpatient MRT Functions

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Section 1. Module Outline

I. INTRODUCTION

Welcome to the module on Basic Inpatient MRT Functions.

The purpose of this module is to cover those activities and processes specific to inpatient records, including recharging records.

All inpatient records have medical records created automatically at the time of admission. PAD parameters may be set to print labels when the record is created.

For accurate record tracking, the site must designate someone in the inpatient record room to track patient records.

> **NOTE TO PRESENTER:** Refer to Site-Specific Questions in Presenter's Guide Overview VI. Commonly Asked Questions.

This module is scheduled to last approximately 2 hours.

The target audience includes:

– PAD File Room Staff and Supervisors

– Site-Selected Personnel who track inpatient records

> **NOTE TO PRESENTER:** Check for new students. If new students are present, remind them to review the Class Specifications for an overview of this course, prerequisites, and material covered in previous modules.

Prerequisites include:

– PAD: Record Tracking
Module 1 - Basic Record Room Functions

DISCUSS OBJECTIVES

– Reprint an MRT label for an inpatient record.

– Check-in an inpatient record.

– Recharge an inpatient record.

– Flag an inpatient record as Missing during recharge.

– Remove flag as Missing during recharge.

– Charge-out an inpatient record.

– Trace patient records.

– Create and charge-out an Ad Hoc Pull List.

II. EXPANDED PRESENTATION

INTRODUCE THE PATIENT ADMINISTRATION (PAD) SYSTEM MENU

- Log on to CHCS and access the PAD System Menu.

The PAD System Menu is the primary menu for patient administration-related functions using CHCS.

INTRODUCE THE PATIENT ADMINISTRATION REFERENCE MANUAL

A reference manual is available at each terminal for use in the classroom.

– The manual is also available at your workcenter.

– All menu definitions are contained in the manual.

- Refer to the Patient Administration Reference Manual for applicable menu diagrams and definitions and procedural flowcharts.
- Enter **???** (to access the menu option descriptions online).
- Press **<Return>** to access remainder of help text or press <^> to exit descriptions.

INTRODUCE THE MEDICAL RECORDS MENU

- Access the Medical Records Menu (MRM) on the PAD System Menu.

    PAD System Menu → MRM

- Enter Record Tracking File Room: MEDICAL RECORDS FILE ROOM// **INPATIENT**

    Explain that the default will be the Outpatient Record Room, however you must access the inpatient record room before you can work out of that file room.

    Point the message:

        You are tracking 'Medical Records Tracking' records ...from the INPATIENT Records file area.

■ REPRINT AN MRT LABEL FOR AN INPATIENT RECORD

Scenario: *The original label on a patient's record is unreadable. Use the register number and reprint a label for that record.*

DISCUSS PATIENT LOOKUP IN INPATIENT RECORDS

Inpatient records are created when a patient is admitted as an inpatient.

During registration the system creates a register number which can be used at both the Select Record and Select Patient prompts.

If there is a barcode reader, users may wand in the record.

If a barcode reader is not available, users may enter the register number to access records or the MRT number to access the record.

NOTE TO PRESENTER: Inpatient users use the register number to identify records. If they use the register number, they are prompted to select the record from a picklist.

Determine a Patient Register Number

- Access the Short Record Inquiry (SR) option on the Record Information Menu.

  PAD System Menu → **MRM** → IN → SR

  Explain that the Short Record Inquiry option displays the record numbers for inpatient episodes.

- Select Division: **<Return>**
- Select Patient: **DODD,ALLAN**
- Confirm patient name: **<Return>**

  Point out the register number for ALLAN DODD, 10572, and write it down.

  Explain to students that they will be working with these options later in the module.

- Return to the Medical Records Menu.

- Access the Create a Label/Record/Volume (CV) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM → CV

- Enter the register number: **10572** (DODD,ALLAN A)
- Confirm the patient data: **<Return>**
- Reprint the label:

  Select VOL 1: **<Select>**

  Verify the label is to be printed: YES// **<Return>**

  Select Label Device: **<Return>**

  Right Margin: 80// **<Return>**

  Enter at printing routing cards or charge cards: BOTH// **N**

- Return to the Transaction Menu.

Practice - This objective is practiced in Practice 1.

■ CHECK-IN AN INPATIENT RECORD

Scenario: *The patient has been dispositioned from the hospital and the record has been received in Inpatient Records. You need to check it in.*

The Check-In Record option is used to record the return of borrowed records to their home location file room. The system records the record being returned, as well as the date and time of return.

Any record inquiry then reflects the home file room as the current borrower each time it is accessed through the Record Tracking System options.

- Access the Check-In Record (IN) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → IN

  Note the screen indicating Records Selected to Be Checked-In to Inpatient Records.

- Refer to Quick Reference Guide: Check-In a Record.
- Enter the register number: **REG10574** (DODD,CHARLES)
- Confirm patient data: **<Return>**
- Select the record:

  Use the **arrow** keys to position the cursor by the volume.

  When the cursor is positioned, press **<Select>**.

  Point out the asterisk (*) that appears next to each selected record.

  Explain that you can deselect a category by pressing <Select> again.

  Activate the selection by pressing **<Return>**.

  Point out message indicating that records have been checked-in.

- Return to the Medical Records Menu.

DISPLAY THE PATIENT RECORD

- Access the Record Inquiry (RI) option on the Record Information Menu.

  PAD System Menu → **MRM** → IN → RI

- Select Division: **<Return>**
- Select Patient: **10574** (DODD,CHARLES C)
- Confirm Patient data: **<Return>**
- Verify that you want to display all record information: ALL// **<Return>**
- Print the record to the screen:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

  Point out that the record was checked into its new home location, Inpatient Records. Point out the record number of Vol 1. It will be used to recharge the record.

- Exit the option and return to the Medical Records Menu.

Practice - This objective is practiced in Practice 1.

■ RECHARGE AN INPATIENT RECORD

Scenario: *The patient has been dispositioned, and the record was returned to the file room. It is now going through the inpatient record management process.*

This the first in a series of recharge activities, including Signature Desk, Analysis, Coding, and Approval.

There is a recharge at each step of the movement, and each of these activities is set up as a designated borrower in the system.

- Access the Recharge Records (RE) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM → RE

- Enter the Borrower: **SIGNATURE DESK**
- Enter the Record Number: **10429**

  Explain that you can enter the MRT record number to directly access the record with a picklist.

- Enter Associated Borrower: **<Return>**
- Press **<Return>** (to quit selecting record numbers).

  Point out messages indicating that the record has been recharged to the Signature Desk.

- Return to the Transaction Menu.

STUDENT LOGON

- Discuss data cards (i.e., username, password, area, access, and verify codes).
- Log on to the training software and use specified data.

Practice 1 - Reprint MRT labels, check-in and recharge a record.

■ FLAG AN INPATIENT RECORD AS MISSING DURING RECHARGE

Scenario: *The record recharged to the Signature Desk cannot be found. Use its MRT record number to flag it as Missing.*

- Access the Flag a Record as Missing (FR) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → FR

- Enter the Record Number: **10429**
- Indicate that you want to flag the record as missing: **Y**
- Supervisor's Comments: **LAST SEEN IN ANALYSIS**
- File the data.

  Point out the message indicating that the record has been flagged as Missing.

- Return to the Transaction Menu.

Practice - This objective is practiced in Practice 2.

■ REMOVE FLAG AS MISSING DURING RECHARGE

Scenario: *The Missing record is returned to you just before you are to recharge it. Remove the Missing flag and recharge it to Coding.*

- Access the Recharge Records (RE) option on the Transaction Menu.

PAD System Menu → MRM → **TM** → RE

- Select Borrower: **CODING**
- Select Record: **10429**
- Press at Associated Borrower: **<Return>**
- Verify that you want to remove the Missing flag: **Y**
- Complete the Finding Missing Records screen:

Where was record found? **SIGNATURE DESK**

Reason: **CHARGED TO WRONG BORROWER**

Supervisor's Comments: **FOUND IN DR. ADDAMS' FILES**

- File the data.
- Press **<Return>** (to quit selecting records to be recharged).

Point out the message that the record has been recharged to Coding.

Explain that you can now recharge the record to Approval.

- Select Borrower: **APPROVAL**
- Select Record: **10429**
- Press at Associate Borrower: **<Return>**

- Press **<Return>** (to quit selecting records to be recharged).

    Point out the message that the record has been recharged to Approval.

- Return to the Transaction Menu.

Practice - This objective is practiced in Practice 2.

■ CHARGE-OUT AN INPATIENT RECORD

Scenario: *The patient has been readmitted to the MTF and the physician is requesting the old record.*

- Access the Charge-Out Record (OT) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → OT

- Select Borrower: **ADDAMS,H**

  Explain that the medical records tracking folders currently charged to borrower displays.

  Point out that Dr. Addams does not currently have any medical records charged out to him.

  Press **<Return>** (to continue).

- Select Record: **10429**
- Enter Associated Borrower: **<Return>**
- Indicate that you want to recharge record 10429: **Y**
- Press **<Return>** (to continue).
- Return to the Medical Records Menu.

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

■ TRACE PATIENT RECORDS

Scenario: *You need to trace the following for a specific patient: inpatient episodes, and all outpatient appointments. Use the Combination Data Trace option to show this activity for the past 100 days.*

- Access the Combination Data Trace (CD) option on the Record Information Menu.

  PAD System Menu → **MRM** → IN → CD

  Explain that this option allows you to generate a chronological list of past record locations, clinic appointments, admission activities, as well as future scheduled clinic appointments for a specified patient.

- Enter the patient to trace: **SCOTT,CHARLES**
- Confirm the patient data: **<Return>**
- Verify the Trace Cut-off Date: T-100// **<Return>**
- Print the record:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

  Point out that the activity on the record is shown in reverse chronological order with future activity separated on the trace.

- Return to the Record Information Menu.

TRACE MOVEMENT HISTORY

Scenario: *You are interested in the outpatient record for a particular patient. Use the Trace Movement History option to display this record.*

- Access the Trace Movement History (TM) option on the Record Information Menu.

  PAD System Menu → MRM → **IN** → TM

  Explain that this option allows you to generate a chronological list of record movements (charge-out, check-in, etc.) for a specified patient.

- Select patient: **FURLEY,CHARLES**

- Confirm the patient data: **<Return>**
- Indicate the record sort? **??** (to display a picklist)

  Explain:

  M(ixed) sort shows movement of all records together.

  S(eparate) sort shows movement of record type and volume separately.

- Indicate a record sort: MIXED// **S**
- Print the record:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

    Point out the separation of outpatient and inpatient records. If there are several of each record type, they display in reverse chronological order.

- Return to the Medical Records Menu.

Practice - There is no practice for this objective.

■ CREATE AND CHARGE-OUT AN AD HOC PULL LIST

Scenario: *At your MTF, records are to be pulled monthly for a Quality Assurance (QA) review. Create an Ad Hoc Pull List so that those records may be charged-out to a member of the QA committee. After creating the Pull List, you display the list, then charge-out the Pull List records to a specified borrower.*

- Access the Create a Pull List (TE) option on the Pull List Function Menu.

  PAD System Menu → **MRM** → PL → TE

- Enter the new Pull List name: **QA PULL LIST**
- Verify that you are adding a new Pull List: **Y**
- Verify Pull List number: **<Return>**
- Verify Pull List title is QA Pull List: **<Return>**
- Enter comments: **REQUEST NUMBER 1**
- Press **<Return>** to exit line 2.
- Bypass edit option: **<Return>**
- Enter record type restriction: **INPATIENT**
- Enter requested volume: LATEST VOLUME// **ALL**
- Enter date records needed: **0624**
- Enter Borrower: **ADDAMS,HENRY**
- Select Record: **748**
  764
  772
  808
  911
  956

  Enter as many records to the list as you need.

  Press **<Return>** when you are finished selecting records.

  Point out:

  The message that indicates the records have been selected.

  The system returns to the Pull List Functions Menu.

DISPLAY THE PULL LIST ON THE SCREEN

- Access the Print Pull List (PT) option on the Pull List Function Menu.

  PAD System Menu → MRM → **PL** → PT

- Enter the Pull List name: **QA** (PULL LIST)

  Explain:

  Enter a double question mark (??) to display existing pull lists.

- Indicate how you want the list sorted: **C**(LINIC NAME)

- Verify that you want all appointments listed: ALL// **<Return>**

  Explain that the types of lists include:

  - All indicates all appointments.
  - Not Fillable indicates a short list of unfillable record requests.
  - Detail-Not Fillable includes a detailed list of unfillable record requests.
  - Update indicates only updates to the list.

- Do not print Routing Cards and Charge Cards: **N**

- Print the list to screen:

  Device: **<Return>**

  Right Margin: **<Return>**

  Point out comments which show that the Pull List is still in the Requested status.

- Return to the Pull List Functions Menu.

CHARGE-OUT THE QA PULL LIST

- Access the Charge-Out Pull List Records (OU) option on the Pull List Functions Menu.

  PAD System Menu → MRM → **PL** → OU

- Verify that no requests are designated as Not Fillable: NO// **<Return>**

- Enter Pull List name: **QA** (PULL LIST)
- Confirm that you do not want to charge out records to a holding area: **<Return>**

  Explain that you are charging-out the records directly to Dr. Addams and that he was listed as the borrower when we created the list.

- Verify that you want to charge-out records: NO// **Y**
- Display charged out pull list:

  Device: **<Return>**

  Right Margin: **<Return>**

  Point out the message that the QA Pull List has been charged-out.

- Return to the PAD System Menu.

DISCUSS HARDWARE

Intermec Barcode Label Printer

- Demonstrate the use and maintenance of the barcode label printer:
  - Replacing labels.
  - Replacing ribbon cartridge.
  - Troubleshooting.

Intermec Barcode Reader

- Demonstrate using the barcode reader:
  - Proper usage of the barcode reader.
  - Reconfigure the barcode reader.

Practice - There is no practice for this objective.

III. BRIEF PRESENTATION

INTRODUCE THE PATIENT ADMINISTRATION (PAD) SYSTEM MENU

- Log on to CHCS and access the PAD System Menu.

The PAD System Menu is the primary menu for patient administration-related functions using CHCS.

INTRODUCE THE PATIENT ADMINISTRATION REFERENCE MANUAL

A reference manual is available at each terminal for use in the classroom.

– The manual is also available at your workcenter.

– All menu definitions are contained in the manual.

- Refer to the Patient Administration Reference Manual for applicable menu diagrams and definitions and procedural flowcharts.

- Enter **???** (to access the menu option descriptions online).

- Press **<Return>** to access remainder of help text or press <^> to exit descriptions.

INTRODUCE THE MEDICAL RECORDS MENU

- Access the Medical Records Menu (MRM) on the PAD System Menu.

PAD System Menu → MRM

- Enter Record Tracking File Room: MEDICAL RECORDS FILE ROOM// **INPATIENT**

■ REPRINT AN MRT LABEL FOR AN INPATIENT RECORD

Scenario: *The original label on a patient's record is unreadable. Use the register number and reprint a label for that record.*

DISCUSS PATIENT LOOKUP IN INPATIENT RECORDS

Inpatient records are created when a patient is admitted as an inpatient.

During registration the system creates a register number which can be used at both the Select Record and Select Patient prompts.

If there is a barcode reader, users may wand in the record.

If a barcode reader is not available, users may enter the register number to access records or the MRT number to access the record.

> **NOTE TO PRESENTER:** Inpatient users use the register number to identify records. If they use the register number, they are prompted to select the record from a picklist.

Determine a Patient Register Number

- Access the Short Record Inquiry (SR) option on the Record Information Menu.

  PAD System Menu → **MRM** → IN → SR

- Select Division: **<Return>**
- Select Patient: **DODD,ALLAN**
- Confirm patient name: **<Return>**
- Return to the Medical Records Menu.
- Access the Create a Label/Record/Volume (CV) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM → CV

- Enter the register number: **10572** (DODD,ALLAN A)
- Confirm the patient data: **<Return>**

- Reprint the label:

  Select VOL 1: **<Select>**

  Verify the label is to be printed: YES// **<Return>**

  Select Label Device: **<Return>**

  Right Margin: 80// **<Return>**

  Enter at printing routing cards or charge cards: BOTH// **N**

- Return to the Transaction Menu.

Practice - This objective is practiced in Practice 1.

■ CHECK-IN AN INPATIENT RECORD

Scenario: *The patient has been dispositioned from the hospital and the record has been received in Inpatient Records. You need to check it in.*

The Check-In Record option is used to record the return of borrowed records to their home location file room. The system records the record being returned, as well as the date and time of return.

Any record inquiry then reflects the home file room as the current borrower each time it is accessed through the Record Tracking System options.

- Access the Check-In Record (IN) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → IN

  Note the screen indicating Records Selected to Be Checked-In to Inpatient Records.

- Refer to Quick Reference Guide: Check-In a Record.
- Enter the register number: **REG10574** (DODD,CHARLES)
- Confirm patient data: **<Return>**
- Select the record:

  Use the **arrow** keys to position the cursor by the volume.

  When the cursor is positioned, press **<Select>**.

- Return to the Medical Records Menu.

DISPLAY THE PATIENT RECORD

- Access the Record Inquiry (RI) option on the Record Information Menu.

  PAD System Menu → **MRM** → IN → RI

- Select Division: **<Return>**
- Select Patient: **10574** (DODD,CHARLES C)
- Confirm Patient data: **<Return>**
- Verify that you want to display all record information: ALL// **<Return>**

- Print the record to the screen:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

- Exit the option and return to the Medical Records Menu.

Practice - This objective is practiced in Practice 1.

■ RECHARGE AN INPATIENT RECORD

Scenario: *The patient has been dispositioned, and the record was returned to the file room. It is now going through the inpatient record management process.*

This the first in a series of recharge activities, including Signature Desk, Analysis, Coding, and Approval.

There is a recharge at each step of the movement, and each of these activities is set up as a designated borrower in the system.

- Access the Recharge Records (RE) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM → RE

- Enter the Borrower: **SIGNATURE DESK**
- Enter the Record Number: **10429**
- Enter Associated Borrower: **<Return>**
- Press **<Return>** (to quit selecting record numbers).
- Return to the Transaction Menu.

STUDENT LOGON

- Discuss data cards (i.e., username, password, area, access, and verify codes).
- Log on to the training software and use specified data.

Practice 1 - Reprint MRT labels, check-in and recharge a record.

■ FLAG AN INPATIENT RECORD AS MISSING DURING RECHARGE

Scenario: *The record recharged to the Signature Desk cannot be found. Use its MRT record number to flag it as Missing.*

- Access the Flag a Record as Missing (FR) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → FR

- Enter the Record Number: **10429**
- Indicate that you want to flag the record as missing: **Y**
- Supervisor's Comments: **LAST SEEN IN ANALYSIS**
- File the data.
- Return to the Transaction Menu.

Practice - This objective is practiced in Practice 2.

■ REMOVE FLAG AS MISSING DURING RECHARGE

Scenario: *The Missing record is returned to you just before you are to recharge it. Remove the Missing flag and recharge it to Coding.*

- Access the Recharge Records (RE) option on the Transaction Menu.

PAD System Menu → MRM → **TM** → RE

- Select Borrower: **CODING**
- Select Record: **10429**
- Press at Associated Borrower: **<Return>**
- Verify that you want to remove the Missing flag: **Y**
- Complete the Finding Missing Records screen:

Where was record found? **SIGNATURE DESK**

Reason: **CHARGED TO WRONG BORROWER**

Supervisor's Comments: **FOUND IN DR. ADDAMS' FILES**

- File the data.
- Press **<Return>** (to quit selecting records to be recharged).
- Select Borrower: **APPROVAL**
- Select Record: **10429**
- Press at Associate Borrower: **<Return>**
- Press **<Return>** (to quit selecting records to be recharged).
- Return to the Transaction Menu.

Practice - This objective is practiced in Practice 2.

■ CHARGE-OUT AN INPATIENT RECORD

Scenario: *The patient has been readmitted to the MTF and the physician is requesting the old record.*

- Access the Charge-Out Record (OT) option on the Transaction Menu.

  PAD System Menu → MRM → **TM** → OT

- Select Borrower: **ADDAMS,H**

  Press **<Return>** (to continue).

- Select Record: **10429**
- Enter Associated Borrower: **<Return>**
- Indicate that you want to recharge record 10429: **Y**
- Press **<Return>** (to continue).
- Return to the Medical Records Menu.

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

■ TRACE PATIENT RECORDS

Scenario: *You need to trace the following for a specific patient: inpatient episodes, and all outpatient appointments. Use the Combination Data Trace option to show this activity for the past 100 days.*

- Access the Combination Data Trace (CD) option on the Record Information Menu.

  PAD System Menu → **MRM** → IN → CD

- Enter the patient to trace: **SCOTT,CHARLES**
- Confirm the patient data: **<Return>**
- Verify the Trace Cut-off Date: T-100**//** **<Return>**
- Print the record:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

- Return to the Record Information Menu.

TRACE MOVEMENT HISTORY

Scenario: *You are interested in the outpatient record for a particular patient. Use the Trace Movement History option to display this record.*

- Access the Trace Movement History (TM) option on the Record Information Menu.

  PAD System Menu → MRM → **IN** → TM

- Select patient: **FURLEY,CHARLES**
- Confirm the patient data: **<Return>**
- Indicate the record sort? **??** (to display a picklist)
- Indicate a record sort: MIXED// **S**

- Print the record:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

- Return to the Medical Records Menu.

Practice - There is no practice for this objective.

■ CREATE AND CHARGE-OUT AN AD HOC PULL LIST

Scenario: *At your MTF, records are to be pulled monthly for a Quality Assurance (QA) review. Create an Ad Hoc Pull List so that those records may be charged-out to a member of the QA committee. After creating the Pull List, you display the list, then charge-out the Pull List records to a specified borrower.*

- Access the Create a Pull List (TE) option on the Pull List Function Menu.

  PAD System Menu → **MRM** → PL → TE

- Enter the new Pull List name: **QA PULL LIST**
- Verify that you are adding a new Pull List: **Y**
- Verify Pull List number: **<Return>**
- Verify Pull List title is QA Pull List: **<Return>**
- Enter comments: **REQUEST NUMBER 1**
- Press **<Return>** to exit line 2.
- Bypass edit option: **<Return>**
- Enter record type restriction: **INPATIENT**
- Enter requested volume: LATEST VOLUME// **ALL**
- Enter date records needed: **0624**
- Enter Borrower: **ADDAMS,HENRY**
- Select Record: **748**
  764
  772
  808
  911
  956

  Enter as many records to the list as you need.

  Press **<Return>** when you are finished selecting records.

DISPLAY THE PULL LIST ON THE SCREEN

- Access the Print Pull List (PT) option on the Pull List Function Menu.

  PAD System Menu → MRM → **PL** → PT

- Enter the Pull List name: **QA** (PULL LIST)
- Indicate how you want the list sorted: **C**(LINIC NAME)
- Verify that you want all appointments listed: ALL// **<Return>**
- Do not print Routing Cards and Charge Cards: **N**
- Print the list to screen:

  Device: **<Return>**

  Right Margin: **<Return>**

- Return to the Pull List Functions Menu.

CHARGE-OUT THE QA PULL LIST

- Access the Charge-Out Pull List Records (OU) option on the Pull List Functions Menu.

  PAD System Menu → MRM → **PL** → OU

- Verify that no requests are designated as Not Fillable: NO// **<Return>**
- Enter Pull List name: **QA** (PULL LIST)
- Confirm that you do not want to charge out records to a holding area: **<Return>**
- Verify that you want to charge-out records: NO// **Y**
- Display charged out pull list:

  Device: **<Return>**

  Right Margin: **<Return>**

- Return to the PAD System Menu.

DISCUSS HARDWARE

Intermec Barcode Label Printer

- Demonstrate the use and maintenance of the barcode label printer:
  - Replacing labels.
  - Replacing ribbon cartridge.
  - Troubleshooting.

Intermec Barcode Reader

- Demonstrate using the barcode reader:
  - Proper usage of the barcode reader.
  - Reconfigure the barcode reader.

Practice - There is no practice for this objective.

IV. CLOSURE

Do you have any questions about the concepts covered in Module 2 - Basic Inpatient MRT Functions?

In summary, the following content was presented:

– Printing labels for existing records.

– Recharging inpatient records.

– Flagging inpatient records as Missing.

– Removing Missing flags during record check-in.

– Tracing patient records.

– Creating Ad Hoc Pull Lists.

Remember that Procedure Flowcharts, Menu Diagrams and Definitions, Quick Reference Guides, output samples, and a Subsystem Glossary are included in the Reference Manual, and may be used to complete the Master Practice.

This concludes Module 2. You now have the opportunity to demonstrate proficiency in the topics or skills presented.

Following the Master Practice, there will be a 10-minute break for those who will participate in the next module.

Please complete the Class Critique before leaving the classroom.

Thank you for attending.

Master Practice - Module 2.

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Section 2. Practices

PRACTICE GUIDELINES

The information you need to complete each practice is supplied in the instructions, scenarios, and associated data cards. Data cards are found in Section 4 of the Student Guide.

Notify the presenter when directed to do so in the practice. This allows the presenter to verify that you have successfully completed an activity.

You may use any reference materials available in the classroom to complete your practices.

You may ask questions or request assistance at any time during the practices.

Device identifiers are site-specific, and will be provided by the presenter.

Refer to your data cards for any specific information that is required, but not listed within the practice scenario or listed data.

Information is only specified for those fields and prompts which require specific data entry. To advance past fields/prompts which are not specified, enter data you know to be correct, or press <Return>.

The practices for this module must be completed in the order in which they are presented. Please complete all parts of each practice before proceeding.

> **NOTE TO PRESENTER:** Tell students whether they may write in their Student Guides while performing the practices/Master Practice. If the Student Guides must be used for another class session, you may not want students to write in their documents.

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Practice 1 - Reprint MRT labels, check-in and recharge a record.

INSTRUCTIONS: You have approximately 10 minutes to complete this practice.

Note: Remember to log on to Inpatient Records from the Medical Records Menu, or you will not be able to work out of this file area.

Scenario 1a: *Reprint a label for a patient's record.*

Access the Create a Label/Record/Volume (CV) option.

Reprint the Medical Record label to your screen.

Do not print routing or charge cards.

Notify the presenter when you have reprinted the label to your screen.

Scenario 1b: *Check-in a record to Inpatient Records. Then recharge the record to Analysis.*

Access the Check-In Record (IN) option.

Check-in the patient record, using the record number.

Access the Recharge Records (RE) option.

Recharge the record.

Notify the presenter when you have completed the recharge.

Return to the Transaction Menu.

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Practice Evaluation Criteria

Practice 1 - Reprint MRT labels, check-in and recharge a record.

Verify that students have reprinted the label, checked-in the record, and recharged the record.

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

INSTRUCTIONS: You have approximately 10 minutes to complete this practice.

Scenario 2a: *The record you recharged to Analysis is missing. Flag it as Missing.*

Access the Flag a Record as Missing (FR) option.

Flag the record as Missing.

Scenario 2b: *The record you flagged as Missing is found. Remove the Missing flag while you recharge the record to the Signature Desk.*

Access the Recharge Records (RE) option.

Remove the Missing flag.

Recharge the record.

Notify the presenter when you have recharged the record.

Scenario 2c: *Charge-out a record for a patient who has been readmitted to your MTF. Use the patient's physician, Dr. Addams, as the borrower.*

Access the Charge-Out Record (OT) option.

Charge-out the record.

Notify the presenter when the record is charged-out.

Return to the Transaction Menu.

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Practice Evaluation Criteria

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

Verify that students have flagged a record as Missing, removed the Missing flag, and recharged the record.

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Section 3. Master Practice

MASTER PRACTICE GUIDELINES

This Master Practice enables the presenter to verify that you have successfully completed the objectives for this module.

The information you need to complete the Master Practice is supplied in the instructions, scenarios, and associated data cards. Data cards are found in Section 4 of the Student Guide.

You may use any reference materials available in the classroom to complete the Master Practice.

Device identifiers are site-specific, and will be provided by the presenter.

Unless otherwise directed by the presenter, please work alone to complete the Master Practice.

Notify the presenter when directed to do so in the Master Practice. This allows the presenter to verify that you have successfully completed an activity.

Information is only specified for those fields and prompts which require specific data entry. To advance past fields/prompts which are not specified, enter data you know to be correct, or press <Return>.

The components of the Master Practice should be completed in the order in which they are presented.

You have approximately 20 minutes to complete this Master Practice.

NOTE TO PRESENTER: Tell students whether they may write in their Student Guides while performing the practices/Master Practice. If the Student Guides must be used for another class session, you may not want students to write in their documents.

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Scenario 1 - Check-in and recharge a record.

INSTRUCTIONS: No additional instructions are required.

Scenario: *An inpatient record has been dispositioned and checked-in to Inpatient Records. Recharge the record to Analysis.*

Recharge the record to Analysis.

Notify the presenter to verify that the record has been checked-in to Analysis.

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Scenario 2 - Flag a record as Missing.

INSTRUCTIONS: No additional instructions are required.

Scenario: *The record recharged to Analysis has been misplaced. Flag this record as Missing.*

Flag the record as Missing.

Notify the presenter to verify that the record has been flagged as Missing.

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Scenario 3 - Remove a Missing flag and recharge the record.

INSTRUCTIONS: No additional instructions are required.

Scenario: *The Missing record is discovered. Remove the Missing flag and recharge the record to the Signature Desk.*

Remove the Missing flag.

Recharge the record to the Signature Desk.

Notify the presenter to verify that the Missing flag has been removed and that the record has been recharged to the Signature Desk.

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Master Practice Evaluation Criteria

Scenario 1 - Check-in and recharge a record.

Verify that the record has been checked-in to Inpatient Records and recharged. Use the Record Inquiry (RI) option to view the record's location.

Scenario 2 - Flag a record as Missing.

Verify that the record has been flagged as Missing. Use the Record Inquiry (RI) option to view that the record is flagged as Missing.

Scenario 3 - Remove a Missing Flag and recharge the record.

Verify that the Missing flag has been removed. Use the Trace Movement History (TM) option to view the record's movement history.

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Section 4. Data Cards

Presenter

Username:	**TRAINING**	Access:	**MRTRT**
Password:		Verify:	**MRTRTV**
Area:	**A**		

PRESENTER'S DEMONSTRATION DATA

All required information is contained in the Module Outline.

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 1

Username:	**TRAINING**	Access:	**MRTRTA**
Password:		Verify:	**MRTRTAV**
Area:	**A**		

Practices:

Practice 1 - Reprint MRT labels, check-in and recharge a record.

Patient Name: **DODD,ALLAN A**
Record Number: **10429**
Borrower: **ANALYSIS**

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

Patient Name: **DODD,ALLAN A**
Record Number: **10429**
Supervisor's Comments: **LAST SEEN ON THE SIGNATURE DESK**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **ADDAMS,HENRY**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **FOUND IN DR. ADDAMS' FILE**
Charge-Out Borrower: **ADDAMS**

Master Practice:

Scenario 1 - Check-in and recharge a record.

Patient Name: **VINCENT,ALLAN**
Record Number: **10687**
Borrower: **ANALYSIS**

Scenario 2 - Flag a record as Missing.

Patient Name: **VINCENT,ALLAN**
Record Number: **10687**
Supervisor's Comments: **LAST SEEN IN ANALYSIS**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 1 (continued)

Scenario 3 - Remove a Missing flag and recharge the record.

Patient Name: **VINCENT,ALLAN**
Record Number: **10687**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **CODING**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **RECORD FOUND IN CODING**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 2

Username:	**TRAINING**	Access:	**MRTRTB**
Password:		Verify:	**MRTRTBV**
Area:	**A**		

Practices:

Practice 1 - Reprint MRT labels, check-in and recharge a record.

Patient Name: **DODD,BARBARA**
Record Number: **10430**
Borrower: **ANALYSIS**

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

Patient Name: **DODD,BARBARA**
Record Number: **10430**
Supervisor's Comments: **LAST SEEN ON THE SIGNATURE DESK**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **ADDAMS,HENRY**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **FOUND IN DR. ADDAMS' FILE**
Charge-Out Borrower: **ADDAMS**

Master Practice:

Scenario 1 - Check-in and recharge a record.

Patient Name: **VINCENT,BARBARA**
Record Number: **10688**
Borrower: **ANALYSIS**

Scenario 2 - Flag a record as Missing.

Patient Name: **VINCENT,BARBARA**
Record Number: **10688**
Supervisor's Comments: **LAST SEEN IN ANALYSIS**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 2 (continued)

Scenario 3 - Remove a Missing flag and recharge the record.

Patient Name: **VINCENT,BARBARA**
Record Number: **10688**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **CODING**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **RECORD FOUND IN CODING**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 3

Username:	**TRAINING**	Access:	**MRTRTC**
Password:		Verify:	**MRTRTCV**
Area:	**A**		

Practices:

Practice 1 - Reprint MRT labels, check-in and recharge a record.

Patient Name: **DODD,DONNA D**
Record Number: **10432**
Borrower: **ANALYSIS**

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

Patient Name: **DODD,DONNA D**
Record Number: **10432**
Supervisor's Comments: **LAST SEEN ON THE SIGNATURE DESK**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **ADDAMS,HENRY**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **FOUND IN DR. ADDAMS' FILE**
Charge-Out Borrower: **ADDAMS**

Master Practice:

Scenario 1 - Check-in and recharge a record.

Patient Name: **VINCENT,CHARLES**
Record Number: **10689**
Borrower: **ANALYSIS**

Scenario 2 - Flag a record as Missing.

Patient Name: **VINCENT,CHARLES**
Record Number: **10689**
Supervisor's Comments: **LAST SEEN IN ANALYSIS**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 3 (continued)

Scenario 3 - Remove a Missing flag and recharge the record.

Patient Name: **VINCENT,CHARLES**
Record Number: **10689**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **CODING**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **RECORD FOUND IN CODING**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 4

Username:	**TRAINING**	Access:	**MRTRTD**
Password:		Verify:	**MRTRTDV**
Area:	**A**		

Practices:

Practice 1 - Reprint MRT labels, check-in and recharge a record.

Patient Name: **DODD,EARL E**
Record Number: **10433**
Borrower: **ANALYSIS**

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

Patient Name: **DODD,EARL E**
Record Number: **10433**
Supervisor's Comments: **LAST SEEN IN ANALYSIS**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **ADDAMS,HENRY**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **FOUND IN DR. ADDAMS' FILE**
Charge-Out Borrower: **ADDAMS**

Master Practice:

Scenario 1 - Check-in and recharge a record.

Patient Name: **VINCENT,EARL**
Record Number: **10691**
Borrower: **ANALYSIS**

Scenario 2 - Flag a record as Missing.

Patient Name: **VINCENT,EARL**
Record Number: **10691**
Supervisor's Comments: **LAST SEEN IN ANALYSIS**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 4 (continued)

Scenario 3 - Remove a Missing flag and recharge the record.

Patient Name: **VINCENT,EARL**
Record Number: **10691**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **CODING**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **RECORD FOUND IN CODING**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 5

Username:	**TRAINING**	Access:	**MRTRTE**
Password:		Verify:	**MRTRTEV**
Area:	**A**		

Practices:

Practice 1 - Reprint MRT labels, check-in and recharge a record.

Patient Name: **DODD,FLORENCE F**
Record Number: **10434**
Borrower: **ANALYSIS**

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

Patient Name: **DODD,FLORENCE F**
Record Number: **10434**
Supervisor's Comments: **LAST SEEN ON THE SIGNATURE DESK**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **ADDAMS,HENRY**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **FOUND IN DR. ADDAMS' FILE**
Charge-Out Borrower: **ADDAMS**

Master Practice:

Scenario 1 - Check-in and recharge a record.

Patient Name: **VINCENT,FLORENCE**
Record Number: **10692**
Borrower: **ANALYSIS**

Scenario 2 - Flag a record as Missing.

Patient Name: **VINCENT,FLORENCE**
Record Number: **10692**
Supervisor's Comments: **LAST SEEN IN ANALYSIS**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 5 (continued)

Scenario 3 - Remove a Missing flag and recharge the record.

Patient Name: **VINCENT,FLORENCE**
Record Number: **10692**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **CODING**
Record Number: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **RECORD FOUND IN CODING**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 6

Username:	**TRAINING**	Access:	**MRTRTF**
Password:		Verify:	**MRTRTFV**
Area:	**A**		

Practices:

Practice 1 - Reprint MRT labels, check-in and recharge a record.

Patient Name: **DODD,GEORGE G**
Record Number: **10435**
Borrower: **ANALYSIS**

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

Patient Name: **DODD,GEORGE G**
Record Number: **10435**
Supervisor's Comments: **LAST SEEN ON THE SIGNATURE DESK**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **ADDAMS,HENRY**
Record Number: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **FOUND IN DR. ADDAMS' FILE**
Charge-Out Borrower: **ADDAMS**

Master Practice:

Scenario 1 - Check-in and recharge a record.

Patient Name: **VINCENT,GEORGE**
Record Number: **10693**
Borrower: **ANALYSIS**

Scenario 2 - Flag a record as Missing.

Patient Name: **VINCENT,GEORGE**
Record Number: **10693**
Supervisor's Comments: **LAST SEEN IN ANALYSIS**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 6 (continued)

Scenario 3 - Remove a Missing flag and recharge the record.

Patient Name: **VINCENT,GEORGE**
Record Number: **10693**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **CODING**
Record Number: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **RECORD FOUND IN CODING**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 7

Username:	**TRAINING**	Access:	**MRTRTG**
Password:		Verify:	**MRTRTGV**
Area:	**A**		

Practices:

Practice 1 - Reprint MRT labels, check-in and recharge a record.

Patient Name: **DODD,HOLLEY**
Record Number: **10436**
Borrower: **ANALYSIS**

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

Patient Name: **DODD,HOLLEY**
Record Number: **10436**
Borrower: **ANALYSIS**
Supervisor's Comments: **LAST SEEN ON THE SIGNATURE DESK**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **ADDAMS,HENRY**
Record Number: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **FOUND IN DR. ADDAMS' FILE**
Charge-Out Borrower: **ADDAMS**

Master Practice:

Scenario 1 - Check-in and recharge a record.

Patient Name: **VINCENT,HOLLEY**
Record Number: **10694**
Borrower: **ANALYSIS**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 7 (continued)

Scenario 2 - Flag a record as Missing.

Patient Name: **VINCENT,HOLLEY**
Record Number: **10694**
Supervisor's Comments: **LAST SEEN IN ANALYSIS**

Scenario 3 - Remove a Missing flag and recharge the record.

Patient Name: **VINCENT,HOLLEY**
Record Number: **10694**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **CODING**
Record Number: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **RECORD FOUND IN CODING**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 8

Username:	**TRAINING**	Access:	**MRTRTH**
Password:		Verify:	**MRTRTHV**
Area:	**A**		

Practices:

Practice 1 - Reprint MRT labels, check-in and recharge a record.

Patient Name: **DODD,IAN I**
Record Number: **10437**
Borrower: **ANALYSIS**

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

Patient Name: **DODD,IAN I**
Record Number: **10437**
Supervisor's Comments: **LAST SEEN ON THE SIGNATURE DESK**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **ADDAMS,HENRY**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **FOUND IN DR. ADDAMS' FILE**
Charge-Out Borrower: **ADDAMS**

Master Practice:

Scenario 1 - Check-in and recharge a record.

Patient Name: **VINCENT,IAN**
Record Number: **10695**
Borrower: **ANALYSIS**

Scenario 2 - Flag a record as Missing.

Patient Name: **VINCENT,IAN**
Record Number: **10695**
Supervisor's Comments: **LAST SEEN IN ANALYSIS**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 8 (continued)

Scenario 3 - Remove a Missing flag and recharge the record.

Patient Name: **VINCENT,IAN**
Record Number: **10695**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **CODING**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **RECORD FOUND IN CODING**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 9

Username:	**TRAINING**	Access:	**MRTRTI**
Password:		Verify:	**MRTRTIV**
Area:	**A**		

Practices:

Practice 1 - Reprint MRT labels, check-in and recharge a record.

Patient Name: **DODD,JACKIE J**
Record Number: **10681**
Borrower: **ANALYSIS**

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

Patient Name: **DODD,JACKIE J**
Record Number: **10681**
Supervisor's Comments: **LAST SEEN ON THE SIGNATURE DESK**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **ADDAMS,HENRY**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **FOUND IN DR. ADDAMS' FILE**
Charge-Out Borrower: **ADDAMS**

Master Practice:

Scenario 1 - Check-in and recharge a record.

Patient Name: **VINCENT,JACKIE**
Record Number: **10696**
Borrower: **ANALYSIS**

Scenario 2 - Flag a record as Missing.

Patient Name: **VINCENT,JACKIE**
Record Number: **10696**
Supervisor's Comments: **LAST SEEN IN ANALYSIS**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 9 (continued)

Scenario 3 - Remove a Missing flag and recharge the record.

Patient Name: **VINCENT,JACKIE**
Record Number: **10696**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **CODING**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **RECORD FOUND IN CODING**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 10

Username:	**TRAINING**	Access:	**MRTRTJ**
Password:		Verify:	**MRTRTJV**
Area:	**A**		

Practices:

Practice 1 - Reprint MRT labels, check-in and recharge a record.

Patient Name: **DODD,KENNETH K**
Record Number: **10684**
Borrower: **ANALYSIS**

Practice 2 - Flag a record as Missing, remove the Missing flag, recharge the record, and charge-out a record.

Patient Name: **DODD,KENNETH K**
Record Number: **10684**
Supervisor's Comments: **LAST SEEN ON THE SIGNATURE DESK**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **ADDAMS,HENRY**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **FOUND IN DR. ADDAMS' FILE**
Charge-Out Borrower: **ADDAMS**

Master Practice:

Scenario 1 - Check-in and recharge a record.

Patient Name: **VINCENT,KENNETH**
Record Number: **10678**
Borrower: **ANALYSIS**

Scenario 2 - Flag a record as Missing.

Patient Name: **VINCENT,KENNETH**
Record Number: **10678**
Supervisor's Comments: **LAST SEEN IN ANALYSIS**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Student 10 (continued)

Scenario 3 - Remove a Missing flag and recharge the record.

Patient Name: **VINCENT,KENNETH**
Record Number: **10678**
Recharge Borrower: **SIGNATURE DESK**
Where was record found: **CODING**
Reason: **CHARGED TO WRONG BORROWER**
Supervisor's Comments: **RECORD FOUND IN CODING**

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Section 5. Reference Materials

Index

Quick Reference Guide **Page**

CHECK-IN A RECORD

This option allows you to check-in a record to its home location.

MENU PATH: PAD → MRM → TM → IN

```
Records Selected to be 'Checked-In' to 'OUTPATIENT FILE ROOM'
Personal - Privacy Act of 1974 (PL-93-579)
------------------------------------------------------------------------
Select Records
Deselect choice by pressing <Select>.
Selections will be processed when you enter a final <Return>
```

```
                **** MEDICAL RECORDS TRACKING PROFILE ****
------------------------------------------------------------------------
Name:  CARTIER,JOHN      (20/455-23-1212)       Birth Date:  29 NOV 1957
Ward:  2B                             Run Date:  09 NOV 2001@1652
------------------------------------------------------------------------
                             Current
     Record Type  Vol        Borrower          Date Charged        Phone/Room#

*1   Outpatient    V1        Johnson, Ben      26 Oct 2001@1436
     (Pull List:  LAM^)        ---                                    ---

 2   Dental        V1          ---             02 Nov 2001@1453       ---
```

Need to know information:

- At the check-in screen, enter patient identifier for the record to be checked-in.
- Select which records are to be checked-in. You are provided with current information regarding the selected record.
- You may continue selecting records to check-in or press <Return> to check-in selected record(s).

MRT CHECK-IN A RECORD

PAD: RECORD TRACKING

Module 2 - Basic Inpatient MRT Functions

Section 6. Transparencies

There are no transparencies for this module.

PAD:
RECORD TRACKING

Module 3 -
Advanced Record Room Functions

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Section 1. Module Outline

I. INTRODUCTION

Welcome to the module on Advanced Record Room Functions.

The purpose of this module is to cover those activities and processes associated with record room supervisory responsibilities, such as inactivating and deleting records, processing records for retirement, and generating management reports.

This module is scheduled to last approximately 2 hours.

The target audience includes Site-Selected Personnel who track inpatient and/or outpatient records.

> **NOTE TO PRESENTER:** Check for new students. If new students are present, remind them to review the Class Specifications for an overview of this course, prerequisites, and material covered in previous modules.

Prerequisites include:

– PAD: Record Tracking
  Module 1 - Basic Record Room Functions

DISCUSS OBJECTIVES

– Inactivate a record.

– Display a record's movement history.

– Delete a record.

– Remove a Not Fillable designation.

– Create a Record Transfer/Retire List.

– Generate a record tracking management report.

II. EXPANDED PRESENTATION

INTRODUCE THE PATIENT ADMINISTRATION (PAD) SYSTEM MENU

- Log on to CHCS and access the PAD System Menu.

The PAD System Menu is the primary menu for patient administration-related functions using CHCS.

INTRODUCE THE PATIENT ADMINISTRATION REFERENCE MANUAL

A reference manual is available at each terminal for use in the classroom.

– The manual is also available at your workcenter.

– All menu definitions are contained in the manual.

- Refer to the Patient Administration Reference Manual for applicable menu diagrams and definitions and procedural flowcharts.
- Enter **???** (to access the menu option descriptions online).
- Press **<Return>** to access remainder of help text or press **<^>** to exit descriptions.

INTRODUCE THE MEDICAL RECORDS MENU

- Access the Medical Records Menu (MRM) on the PAD System Menu.

PAD System Menu → MRM

- Confirm Medical Records File Room as the file room location.
- Accept the file room's default devices: **<Return>**

■ INACTIVATE A RECORD

Scenario: *One volume of a patient's record is to be used as part of a Judge Advocate General (JAG) investigation. You have been directed to inactivate the record so it may not be charged-out to other requestors until the investigation is complete. Create outpatient Volume 4. Then inactivate that record.*

- Access the Create a Label/Record/Volume (CV) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM → CV

- Refer to Quick Reference Guide: Create a Record.
- Select Patient Name: **P0060** (PARR,ALLAN)

  Point out that the system displays existing records.

- Press **<Return>** (to continue).

CREATE A VOLUME FOR THE JAG INVESTIGATION

- Verify that you want to create a new record: **Y**
- Enter New Record Type: **OUTPATIENT**
- Verify that you want to create Outpatient Vol 4: **Y**
- Bypass associated borrower and content descriptor.
- File the data.

> **NOTE TO PRESENTER:** You will use the system-generated record number of Volume 4 of PARR,ALLAN in the next demonstration.

- Do not print labels or routine cards.
- Return to the Transaction Menu.

INACTIVATE THE VOLUME CREATED FOR THE JAG INVESTIGATION

- Access the Inactivate/Reactivate Records (AC) option on the Transaction Menu.

  PAD System Menu ➔ MRM ➔ **TM** ➔ AC

- Enter Movement Type: **??** (to display a picklist).

  Explain:

  The Inactivate/Re-Activate Records option is used to prevent a record from being selected for any transaction until the Inactive status is removed.

  The difference between Inactivate and Re-Activate Record is as follows:

  – Inactivate Record charges the record to the borrower entered who is retaining the record for an extended period. This may be a person, location, or file room. No further transactions can be entered until the record is reactivated.

  – Re-Activate Record charges the record to the location associated with the user performing re-activation (i.e., the Home File Room).

- Enter Movement Type: **I**(NACTIVATE RECORD)

  Explain that this status prevents the record from being checked-out.

- Enter Borrower: **LEGAL**

  Explain that you may enter any borrower with the exception of hospital locations (such as clinics) or providers.

- Confirm that you are adding LEGAL as a new BORROWERS–FILE AREAS: **YES**

- Confirm BORROWERS–FILE AREAS NUMBER: **<Return>**

- Enter Phone #: **<Return>**

- Enter Location/Room#: **<Return>**

  Point out the message that no medical records are currently charged out to this borrower.

- Press **<Return>** and enter record to be inactivated: **PARR,ALLAN**

Point out that the system displays the patient's medical records tracking profile.

- Select V4 and press **<Return>**
- Enter Associated Borrower: **<Return>**
- Press **<Return>** (to process the selection).
- Enter Transfer Comment: **JAG INVESTIGATION**

Point out system message indicating that the record is inactivated.

Inform class that this option also allows records to be reactivated, either one at a time, or many together at one time.

- Return to the Medical Records Menu.

DISPLAY THE INACTIVE RECORD

- Access the Record Inquiry (RI) option on the Record Information Menu.

PAD System Menu → **MRM** → IN → RI

- Select Division: **<Return>**
- Select Patient Name: **P0060** (PARR,ALLAN)
- Indicate information to display: ALL// **<Return>**
- Display the patient record to the screen:

Device: **<Return>**

Right Margin: **<Return>**

Point out the Inactive status in the Movement column and the Inactive flag.

- Return to the Record Information Menu.

NOTE TO PRESENTER: Remind students that the Record Inquiry option can also be used to locate record numbers.

- Access the Short Record Inquiry (SR) option on the Record Information Menu.

  PAD System Menu → MRM → **IN** → SR

- Select Division: **<Return>**
- Select Patient Name: **P0060** (PARR,ALLAN)

  Point out the Inactive record message on the file.

- Press **<Return>** (to exit the option).
- Return to the Record Information Menu.

Practice - This objective is practiced in Practice 1.

■ DISPLAY A RECORD'S MOVEMENT HISTORY

Scenario: *The JAG investigator has learned that the third volume of the patient's outpatient record was missing. He would like you to print a movement history for this record.*

The Trace Movement History option provides a listing of a specific patient's record movement, either chronologically by the entire record, or chronologically by volume.

- Access the Trace Movement History (TM) option on the Record Information Menu.

  PAD System Menu → MRM → **IN** → TM

- Refer to Quick Reference Guide: Trace a Record's Movement History.
- Select Patient Name: **P0060** (PARR,ALLAN)
- Sort the medical record tracking record: **??** (to display a picklist).

  Explain that there are two types of sort values:

  – M(ixed) sorts movements of all records together.

  – S(eparate) sorts each record type and volume separately.

  Inform class that in this demonstration, the separate record sort will be demonstrated.

- Sort the record: MIXED// **S** (for separate)
- Enter at Device: **<Return>**
- Enter at Right Margin: 80// **<Return>**

  Point out the sort by record type and volume.

  Explain:

  This report specified a sort by separate record and volume types. A mixed sort produces a report of all record movement in chronological order.

  Other inquiry options are available.

- Refer to Reference Manual, Menu Diagrams & Definitions: Record Inquiry Menu.

- Press **<Return>** (to exit the option).
- Return to the Medical Records Menu.

Practice - This objective is practiced in Practice 1.

■ DELETE A RECORD

Scenario: *Since the JAG investigation is over, a separate volume of the outpatient record is no longer required. Re-activate Volume 4 of your patient's record, then delete that volume.*

The Delete a Record option allows you to delete a record and all associated requests, missing log entries, movements, etc., from the Record Tracking System. This option is locked by security key: RT DELETE

NOTE TO PRESENTER: Inform students that the system sends a bulletin though MailMan that the record has been deleted.

- Access the Inactive/Re-Activate Records (AC) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM → AC

- Enter Movement Type: **R**(EACTIVATE RECORD)
- Select the record: **PARR,ALLAN**
- Select V4 and press **<Return>** twice to process the selection.

  Bypass the Transfer Comment field: **<Return>**

  Explain:

  The following message displays: Selected Record will now be Re-Activated. Record has been Re-Activated to [record room].

  The Transaction Menu displays.

- Access the Delete a Record (DR) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM → DR

- Select the record to be deleted: **PARR,ALLAN**
- Select V4.

  Point out message that associated data will be deleted if the record is deleted.

- Indicate that you want to delete this record: **Y**
- Enter the reason for deletion: **NOT REQUIRED**

  Note that the system displays deletion process messages, and that a Mail Bulletin is generated when a record is deleted.

- Return to the Medical Records Menu.

STUDENT LOGON

- Discuss data cards (i.e., username, password, area, access, and verify codes).
- Log on to the training software and use specified data.

Practice 1 - Inactivate records, display a record's movement history, and delete records.

■ REMOVE A NOT FILLABLE DESIGNATION

Scenario: *During the creation of a Pull List, a record was placed on Hold. You may now release the request from Hold so that it may be filled.*

Records can be flagged as Not Fillable when using the Charge Out Pull List Records option.

The Designate Request as Not Fillable option can be used to remove the Not Fillable flag. Using this option to remove the flag reinstates a Requested status for the record if one exists.

- Access the Designate Requests as Not Fillable (NO) option on the Request Record Menu.

  PAD System Menu → **MRM** → RR → NO

- Select request: **1**

  Explain that patient identifier or request number may be entered.

- Verify you want to change status to requested: YES// **<Return>**
- Press **<Return>** (to exit the option).
- Return to the Medical Records Menu.

DISCUSS TRANSFER/RETIRE MENU OPTIONS

The Transfer/Retire Menu contains options that allow you to transfer and retire records in the Record Tracking System.

Selected options on the Transfer/Retire Menu are used to generate a list of records eligible for transfer or retirement, print the list, process the records, and print a Final Transfer List.

These options can be used to transfer inactive records to another file area, freeing space in the primary record room for more active records.

These options can also be used to identify records that should be moved due to lack of activity, retired to the national records center, or to transfer an entire record room to another location.

- Access the Transfer/Retire Menu (FE) option on the Medical Records Menu.

  PAD System Menu → **MRM** → FE

Remind the class that definitions for all Transfer/Retire Menu options can be found in the PAD Reference Manual.

- Refer to the following Quick Reference Guides for answers to questions about the Transfer/Retire options:

  - Create List for Record Transfer/Retire
  - Print a Transfer/Retire List
  - Process a Transfer/Retire List
  - Edit a Transfer/Retire List
  - Delete a Transfer/Retire List

- Remain at the Transfer/Retire Menu.

Practice - There is no practice for this objective.

■ CREATE A RECORD TRANSFER/RETIRE LIST

Scenario: *You need to create a list of those records that have been inactive for the last year so they can be transferred to another file room.*

The Create List for Record Transfer/Retire option allows you to generate a list of records eligible to be transferred to another file room or retired. To verify that the records selected are eligible for transfer, you need to print the Transfer/Retire List, then edit the transfer list to make sure that all records are eligible for transfer retire.

- Access the Create List for Record Transfer/Retire (CL) option on the Transfer/Retire Menu.

  PAD System Menu → MRM → **FE** → CL

- Refer to Quick Reference Guide: Create List for Record Transfer/Retire.

  Explain:

  This option is used first in the Record Retire/Transfer process.

  It creates a template so that the system can search for records on the list.

  Point out Retire/Transfer List Create screen for logged-on file room.

  These fields establish parameters by which eligible records are selected to retire or transfer.

  You can now complete the Create List for Record Transfer/Retire screen.

- Enter the movement activity: **M**(OVE TO ANOTHER FILE AREA)
- Enter the type of record: **O**(UTPATIENT)
- Enter the destination: **OP** (OPREC 58;SC)
- **<Select>** next to OPREC 58;SC
- Enter the last activity method: **0** (INDIVIDUAL'S RECORD)
- Enter Last Activity Date: **T-365**
- Enter patient category: **E** (for all categories)

  Explain that patient categories include:

  A - Selects active duty records.

D - Selects records for family members/ retiree records.

E - Selects records for all categories.

O - Other

- Enter sort restriction: **T** (Terminal Digit)
- Bypass From and To parameters.
- File the data.

  Point out the message indicating search date for the list

- Enter Device: **NL:**
- Enter start time: **T@2400**

  Explain that the record selection process is very time consuming and should be run during off hours.

  Point out message that the print task was successful.

- Press **<Return>** to continue.

PRINT A TRANSFER/RETIRE LIST

The printed list may be used to:

– Verify entries prior to processing.

– Maintain at the MTF for historical purposes.

– Enclose with record sent for retirement.

- Access the Print Transfer/Retire List (LI) option on the Transfer/Retire Menu.

  PAD System Menu → MRM → **FE** → LI

- Refer to Quick Reference Guide: Print a Transfer/Retire List.
- Enter the Transfer-Retire List Name: **M**(EDICAL RECORDS FILE ROOM)

  Explain:

  The Retire List Name is named after the file room running the list.

To select the appropriate Transfer/Retire List for printing, editing, and processing, you need to enter the record room, then select the date of the desired list.

- Enter sort order: **T** (Terminal Digit)

  Explain that you may sort the list by terminal digit order or by alphabet.

- Enter Device: **WIDE**

  Explain that the list for this demonstration will not display to the screen as the processing time was entered at 'T@2400.'

- Refer to Reference Materials, Sample: Transfer/Retire Listing.

- Return to the Transfer/Retire Menu.

DISCUSS THE EDIT A TRANSFER/RETIRE LIST OPTION

- Access the Edit Transfer/Retire (EL) option on the Transfer/Retire Menu.

  PAD System Menu → MRM → **FE** → EL

  Explain:

  The Edit Transfer/Retire List option allows you to delete any records that are not eligible to be inactivated and transferred.

  These can be records that are flagged as Missing or that need to be retained for teaching or special interest issues at the MTF.

- Refer to Quick Reference Guide: Edit a Transfer/Retire List.

- Return to the Transfer/Retire Menu.

PROCESS A TRANSFER/RETIRE LIST OPTION

- Access the Process Transfer/Retire List (PR) option on the Transfer/Retire Menu.

  PAD System Menu → MRM → **FE** → PR

  Explain:

  The Process Transfer/Retire Lists option allows you to process the list of records that are selected as eligible to transfer/retire.

Before the list is processed, you have an opportunity to verify that the selection criteria are correct.

- Enter Record Transfer/Retire List Name: **M**(EDICAL RECORDS FILE ROOM)

Point out the display of all parameters by which eligible records were selected.

Explain that it is critical that this information be reviewed before proceeding.

Point out the message indicating that all records included in the selected batch will be processed.

- Confirm this is the correct batch: NO// **Y**
- Enter at Are you Sure? NO// **Y**
- Enter Transfer Comment: **INACTIVE ONE YEAR - TRANSFER TO HOLDING**
- Enter at Device: **<Return>**
- Enter at Right Margin: 80// **<Return>**

Point out message indicating completion of process.

Inform students that they may print a final list of the transferred records using the Print Transfer/Retire List option.

- Return to the Medical Records Menu.
- Refer to Quick Reference Guide: Process a Transfer/Retire List.

DISCUSS SYSTEM DEFINITIONS MENU

NOTE TO PRESENTER: If you have determined that record room supervisory personnel will help maintain the record tracking application, describe the available menu options.

- Access the System Definition Menu (SD) option on the Medical Records Menu.

PAD System Menu → **MRM** → SD

- Enter **???** (to display online descriptions of the System Description Menu options).
- Press **<Return>** until all descriptions have been displayed.
- Refer to Quick Reference Guides and review:
  - File Room Set-Up
  - Label Formatter
  - Type of Record Set-Up
  - Application Set-Up
  - Borrower Set-Up
  - Return to the Medical Records Menu.

Practice - There is no practice for this objective.

■ GENERATE A RECORD TRACKING MANAGEMENT REPORT

Scenario: *One of your tasks during this shift is to generate and print a list showing all the records that have been flagged as missing. Generate and print a Missing Records List report.*

DISCUSS INPATIENT DIVIDED WORKCENTER (IPDWC) CHANGES REGARDING MEDICAL RECORD TRACKING (MRT) REPORTS

When printing Record Tracking management reports, you are restricted to a single home location within your division. Within the division, you may access any home location for which you hold the security key. Two exceptions apply: the Records Charged to a Borrower report and the Overdue Records List can still be printed by either division or home location.

The correct MTF name is reflected in the header of MRT reports. Historically, the name of the lead facility was printed in the header.

All reports which are sorted by terminal digit will display the FMP/SSN in the first position on the report.

- Access the Missing Records List (ML) option on the Management Reports Menu.

  PAD System Menu → **MRM** → MA → ML

  Explain:

  This output displays the records that are flagged as missing or in a pending status for the selected record room and specified time.

- Specify the print criteria for this report:

  Select HOME LOCATION: MEDICAL RECORDS FILE ROOM// **<Return>**

  Explain:

  Enter a double question mark (??) at this prompt to display the record rooms within your current division.

  Earliest Date/Time Record Charged: T-30// **<Return>**

Explain:

This date and time cannot be later than the present date/time, and must be earlier than the entry for the Latest Date/Time prompt.

Latest Date/Time Record Charged: T// **<Return>**

- Display the report on the screen:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

  Point out data on the report.

  Explain:

  When reports are requested for which no data is found, the system displays the message: 'No data for parameters selected.'

  Press **<Return>** to view three separate screens of the report, then press <^> to exit the option and return to the Management Reports Menu.

- Refer to Reference Materials, Sample: Missing Records List Report.

DISCUSS ADDITIONAL OUTPUTS ON THE MANAGEMENTS REPORTS MENU

Ad Hoc Request Response Statistics report - Allows you to generate a statistical output of a File Room response time to individual record requests for a specified date range. Requests on this report must have a status of Charged, Canceled, or Not Fillable. Requests either associated with pull lists or with a status of Pending are not included on the Ad Hoc Request Response Statistics report.

Charged Records By Home Location - Allows you to generate a report that lists records checked out and their current location. The output is sorted by home location.

Loose Filing Report - Allows you to create a listing of medical record pages that have not been filed in the patients medical record. This report must be printed in 132 column format.

Overdue Records List - Allows you to create a list of records that were not returned to their home location within the scheduled time set in the Systems Definitions. This output can be sorted by borrower, patient name or SSN.

Pending Request List - Allows you to generate a report of those records which have been requested but not charged out.

Records Charged to a Borrower - Allows you to create a list of records that are checked out, and the borrower. This list is generated alphabetically by patient name.

- Refer to Reference Materials: MRT Management Reports Matrix.

    Explain:

    The matrix provides an overview of printing restrictions for MRT Management reports.

- Return to the PAD System Menu.

Practice 2 - Generate a Record Tracking Management Report.

III. BRIEF PRESENTATION

INTRODUCE THE PATIENT ADMINISTRATION (PAD) SYSTEM MENU

- Log on to CHCS and access the PAD System Menu.

The PAD System Menu is the primary menu for patient administration-related functions using CHCS.

INTRODUCE THE PATIENT ADMINISTRATION REFERENCE MANUAL

A reference manual is available at each terminal for use in the classroom.

– The manual is also available at your workcenter.

– All menu definitions are contained in the manual.

- Refer to the Patient Administration Reference Manual for applicable menu diagrams and definitions and procedural flowcharts.
- Enter **???** (to access the menu option descriptions online).
- Press **<Return>** to access remainder of help text or press **<^>** to exit descriptions.

INTRODUCE THE MEDICAL RECORDS MENU

- Access the Medical Records Menu (MRM) on the PAD System Menu.

PAD System Menu → MRM

- Confirm Medical Records File Room as the file room location.
- Accept the file room's default devices: **<Return>**

■ INACTIVATE A RECORD

Scenario: *One volume of a patient's record is to be used as part of a Judge Advocate General (JAG) investigation. You have been directed to inactivate the record so it may not be charged-out to other requestors until the investigation is complete. Create outpatient Volume 4. Then inactivate that record.*

- Access the Create a Label/Record/Volume (CV) option on the Transaction Menu.

  PAD System Menu ➔ **MRM** ➔ TM ➔ CV

- Refer to Quick Reference Guide: Create a Record.
- Select Patient Name: **P0060** (PARR,ALLAN)
- Press **<Return>** (to continue).

CREATE A VOLUME FOR THE JAG INVESTIGATION

- Verify that you want to create a new record: **Y**
- Enter New Record Type: **OUTPATIENT**
- Verify that you want to create Outpatient Vol 4: **Y**
- Bypass associated borrower and content descriptor.
- File the data.

> **NOTE TO PRESENTER:** You will use the system-generated record number of Volume 4 of PARR,ALLAN in the next demonstration.

- Do not print labels or routine cards.
- Return to the Transaction Menu.

INACTIVATE THE VOLUME CREATED FOR THE JAG INVESTIGATION

- Access the Inactivate/Reactivate Records (AC) option on the Transaction Menu.

  PAD System Menu ➔ MRM ➔ **TM** ➔ AC

- Enter Movement Type: **??** (to display a picklist).
- Enter Movement Type: **I**(NACTIVATE RECORD)
- Enter Borrower: **LEGAL**
- Confirm that you are adding LEGAL as a new BORROWERS–FILE AREAS: **YES**
- Confirm BORROWERS–FILE AREAS NUMBER: **<Return>**
- Enter Phone #: **<Return>**
- Enter Location/Room#: **<Return>**
- Press **<Return>** and enter record to be inactivated: **PARR,ALLAN**
- Select V4 and press **<Return>**
- Enter Associated Borrower: **<Return>**
- Press **<Return>** (to process the selection).
- Enter Transfer Comment: **JAG INVESTIGATION**
- Return to the Medical Records Menu.

DISPLAY THE INACTIVE RECORD

- Access the Record Inquiry (RI) option on the Record Information Menu.

  PAD System Menu → **MRM** → IN → RI

- Select Division: **<Return>**
- Select Patient Name: **P0060** (PARR,ALLAN)
- Indicate information to display: ALL// **<Return>**
- Display the patient record to the screen:

  Device: **<Return>**

  Right Margin: **<Return>**

- Return to the Record Information Menu.

> **NOTE TO PRESENTER**: Remind students that the Record Inquiry option can also be used to locate record numbers.

- Access the Short Record Inquiry (SR) option on the Record Information Menu.

  PAD System Menu → MRM → **IN** → SR

- Select Division: **<Return>**
- Select Patient Name: **P0060** (PARR,ALLAN)
- Press **<Return>** (to exit the option).
- Return to the Record Information Menu.

Practice - This objective is practiced in Practice 1.

■ DISPLAY A RECORD'S MOVEMENT HISTORY

Scenario: *The JAG investigator has learned that the third volume of the patient's outpatient record was missing. He would like you to print a movement history for this record.*

The Trace Movement History option provides a listing of a specific patient's record movement, either chronologically by the entire record, or chronologically by volume.

- Access the Trace Movement History (TM) option on the Record Information Menu.

  PAD System Menu → MRM → **IN** → TM

- Refer to Quick Reference Guide: Trace a Record's Movement History.
- Select Patient Name: **P0060** (PARR,ALLAN)
- Sort the medical record tracking record: **??** (to display a picklist).
- Sort the record: MIXED// **S** (for separate)
- Enter at Device: **<Return>**
- Enter at Right Margin: 80// **<Return>**
- Refer to Reference Manual, Menu Diagrams & Definitions: Record Inquiry Menu.
- Press **<Return>** (to exit the option).
- Return to the Medical Records Menu.

Practice - This objective is practiced in Practice 1.

■ DELETE A RECORD

Scenario: *Since the JAG investigation is over, a separate volume of the outpatient record is no longer required. Re-activate Volume 4 of your patient's record, then delete that volume.*

The Delete a Record option allows you to delete a record and all associated requests, missing log entries, movements, etc., from the Record Tracking System. This option is locked by security key: RT DELETE

NOTE TO PRESENTER: Inform students that the system sends a bulletin though MailMan that the record has been deleted.

- Access the Inactive/Re-Activate Records (AC) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM → AC

- Enter Movement Type: **R**(EACTIVATE RECORD)
- Select the record: **PARR,ALLAN**
- Select V4 and press **<Return>** twice to process the selection.

  Bypass the Transfer Comment field: **<Return>**

- Access the Delete a Record (DR) option on the Transaction Menu.

  PAD System Menu → **MRM** → TM → DR

- Select the record to be deleted: **PARR,ALLAN**
- Select V4.
- Indicate that you want to delete this record: **Y**
- Enter the reason for deletion: **NOT REQUIRED**

  Note that the system displays deletion process messages, and that a Mail Bulletin is generated when a record is deleted.

- Return to the Medical Records Menu.

STUDENT LOGON

- Discuss data cards (i.e., username, password, area, access, and verify codes).
- Log on to the training software and use specified data.

Practice 1 - Inactivate records, display a record's movement history, and delete records.

■ REMOVE A NOT FILLABLE DESIGNATION

Scenario: *During the creation of a Pull List, a record was placed on Hold. You may now release the request from Hold so that it may be filled.*

Records can be flagged as Not Fillable when using the Charge Out Pull List Records option.

The Designate Request as Not Fillable option can be used to remove the Not Fillable flag. Using this option to remove the flag reinstates a Requested status for the record if one exists.

- Access the Designate Requests as Not Fillable (NO) option on the Request Record Menu.

  PAD System Menu → **MRM** → RR → NO

- Select request: **1**
- Verify you want to change status to requested: YES// **<Return>**
- Press **<Return>** (to exit the option).
- Return to the Medical Records Menu.

DISCUSS TRANSFER/RETIRE MENU OPTIONS

The Transfer/Retire Menu contains options that allow you to transfer and retire records in the Record Tracking System.

Selected options on the Transfer/Retire Menu are used to generate a list of records eligible for transfer or retirement, print the list, process the records, and print a Final Transfer List.

These options can be used to transfer inactive records to another file area, freeing space in the primary record room for more active records.

These options can also be used to identify records that should be moved due to lack of activity, retired to the national records center, or to transfer an entire record room to another location.

- Access the Transfer/Retire Menu (FE) option on the Medical Records Menu.

  PAD System Menu → **MRM** → FE

- Refer to the following Quick Reference Guides for answers to questions about the Transfer/Retire options:
  - Create List for Record Transfer/Retire
  - Print a Transfer/Retire List
  - Process a Transfer/Retire List
  - Edit a Transfer/Retire List
  - Delete a Transfer/Retire List
- Remain at the Transfer/Retire Menu.

Practice - There is no practice for this objective.

■ CREATE A RECORD TRANSFER/RETIRE LIST

Scenario: *You need to create a list of those records that have been inactive for the last year so they can be transferred to another file room.*

The Create List for Record Transfer/Retire option allows you to generate a list of records eligible to be transferred to another file room or retired. To verify that the records selected are eligible for transfer, you need to print the Transfer/Retire List, then edit the transfer list to make sure that all records are eligible for transfer retire.

- Access the Create List for Record Transfer/Retire (CL) option on the Transfer/ Retire Menu.

  PAD System Menu ➔ MRM ➔ **FE** ➔ CL

- Refer to Quick Reference Guide: Create List for Record Transfer/Retire.
- Enter the movement activity: **M**(OVE TO ANOTHER FILE AREA)
- Enter the type of record: **O**(UTPATIENT)
- Enter the destination: **OP** (OPREC 58;SC)
- **<Select>** next to OPREC 58;SC
- Enter the last activity method: **0** (INDIVIDUAL'S RECORD)
- Enter Last Activity Date: **T-365**
- Enter patient category: **E** (for all categories)
- Enter sort restriction: **T** (Terminal Digit)
- Bypass From and To parameters.
- File the data.
- Enter Device: **NL:**
- Enter start time: **T@2400**
- Press **<Return>** to continue.

PRINT A TRANSFER/RETIRE LIST

The printed list may be used to:

– Verify entries prior to processing.

– Maintain at the MTF for historical purposes.

– Enclose with record sent for retirement.

- Access the Print Transfer/Retire List (LI) option on the Transfer/Retire Menu.

    PAD System Menu → MRM → **FE** → LI

- Refer to Quick Reference Guide: Print a Transfer/Retire List.
- Enter the Transfer-Retire List Name: **M**(EDICAL RECORDS FILE ROOM)
- Enter sort order: **T** (Terminal Digit)
- Enter Device: **WIDE**
- Refer to Reference Materials Sample: Transfer/Retire Listing.
- Return to the Transfer/Retire Menu.

DISCUSS THE EDIT A TRANSFER/RETIRE LIST OPTION

- Access the Edit Transfer/Retire (EL) option on the Transfer/Retire Menu.

    PAD System Menu → MRM → **FE** → EL

- Refer to Quick Reference Guide: Edit a Transfer/Retire List.
- Return to the Transfer/Retire Menu.

PROCESS A TRANSFER/RETIRE LIST OPTION

- Access the Process Transfer/Retire List (PR) option on the Transfer/Retire Menu.

    PAD System Menu → MRM → **FE** → PR

- Enter Record Transfer/Retire List Name: **M**(EDICAL RECORDS FILE ROOM)

- Confirm this is the correct batch: NO// **Y**
- Enter at Are you Sure? NO// **Y**
- Enter Transfer Comment: **INACTIVE ONE YEAR - TRANSFER TO HOLDING**
- Enter at Device: **<Return>**
- Enter at Right Margin: 80// **<Return>**
- Return to the Medical Records Menu.
- Refer to Quick Reference Guide: Process a Transfer/Retire List.

DISCUSS SYSTEM DEFINITIONS MENU

> **NOTE TO PRESENTER:** If you have determined that record room supervisory personnel will help maintain the record tracking application, describe the available menu options.

- Access the System Definition Menu (SD) option on the Medical Records Menu.

  PAD System Menu → **MRM** → SD

- Enter **???** (to display online descriptions of the System Description Menu options).
- Press **<Return>** until all descriptions have been displayed.
- Refer to Quick Reference Guides and review:
  - File Room Set-Up
  - Label Formatter
  - Type of Record Set-Up
  - Application Set-Up

– Borrower Set-Up

– Return to the Medical Records Menu.

Practice - There is no practice for this objective.

■ GENERATE A RECORD TRACKING MANAGEMENT REPORT

Scenario: *One of your tasks during this shift is to generate and print a list showing all the records that have been flagged as missing. Generate and print a Missing Records List report.*

DISCUSS INPATIENT DIVIDED WORKCENTER (IPDWC) CHANGES REGARDING MEDICAL RECORD TRACKING (MRT) REPORTS

When printing Record Tracking management reports, you are restricted to a single home location within your division. Within the division, you may access any home location for which you hold the security key. Two exceptions apply: the Records Charged to a Borrower report and the Overdue Records List can still be printed by either division or home location.

The correct MTF name is reflected in the header of MRT reports. Historically, the name of the lead facility was printed in the header.

All reports which are sorted by terminal digit will display the FMP/SSN in the first position on the report.

- Access the Missing Records List (ML) option on the Management Reports Menu.

  PAD System Menu → **MRM** → MA → ML

- Specify the print criteria for this report:

  Select HOME LOCATION: MEDICAL RECORDS FILE ROOM// **<Return>**

  Earliest Date/Time Record Charged: T-30// **<Return>**

  Latest Date/Time Record Charged: T// **<Return>**

- Display the report on the screen:

  Device: **<Return>**

  Right Margin: 80// **<Return>**

  Press **<Return>** to view three separate screens of the report, then press <^> to exit the option and return to the Management Reports Menu.

- Refer to Reference Materials sample: Missing Records List Report.

DISCUSS ADDITIONAL OUTPUTS ON THE MANAGEMENTS REPORTS MENU

Ad Hoc Request Response Statistics report - Allows you to generate a statistical output of a File Room response time to individual record requests for a specified date range. Requests on this report must have a status of Charged, Canceled, or Not Fillable. Requests either associated with pull lists or with a status of Pending are not included on the Ad Hoc Request Response Statistics report.

Charged Records By Home Location - Allows you to generate a report that lists records checked out and their current location. The output is sorted by home location.

Loose Filing Report - Allows you to create a listing of medical record pages that have not been filed in the patients medical record. This report must be printed in 132 column format.

Overdue Records List - Allows you to create a list of records that were not returned to their home location within the scheduled time set in the Systems Definitions. This output can be sorted by borrower, patient name or SSN.

Pending Request List - Allows you to generate a report of those records which have been requested but not charged out.

Records Charged to a Borrower - Allows you to create a list of records that are checked out, and the borrower. This list is generated alphabetically by patient name.

- Refer to Reference Materials: MRT Management Reports Matrix.
- Return to the PAD System Menu.

Practice 2 - Generate a Record Tracking Management Report.

IV. CLOSURE

Do you have any questions about the concepts covered in Module 3 - Advanced Record Room Functions?

In summary, the following content was presented:

– Inactivating records.

– Displaying record movements.

– Deleting records.

– Removing Not Fillable designations.

– Creating Transfer Retire Lists.

– Generating a Missing Records List report.

Remember that Procedure Flowcharts, Menu Diagrams and Definitions, Quick Reference Guides, output samples, and a Subsystem Glossary are included in the Reference Manual, and may be used to complete the Master Practice.

This concludes Module 3. This also concludes PAD: Record Tracking. You now have the opportunity to demonstrate proficiency in the topics or skills presented.

Please complete the Class Critique before leaving the classroom.

Thank you for attending.

Master Practice - Module 3.

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Section 2. Practices

PRACTICE GUIDELINES

The information you need to complete each practice is supplied in the instructions, scenarios, and associated data cards. Data cards are found in Section 4 of the Student Guide.

Notify the presenter when directed to do so in the practice. This allows the presenter to verify that you have successfully completed an activity.

You may use any reference materials available in the classroom to complete your practices.

You may ask questions or request assistance at any time during the practices.

Device identifiers are site-specific, and will be provided by the presenter.

Refer to your data cards for any specific information that is required, but not listed within the practice scenario or listed data.

Information is only specified for those fields and prompts which require specific data entry. To advance past fields/prompts which are not specified, enter data you know to be correct, or press <Return>.

The practices for this module must be completed in the order in which they are presented. Please complete all parts of each practice before proceeding.

NOTE TO PRESENTER: Tell students whether they may write in their Student Guides while performing the practices/Master Practice. If the Student Guides must be used for another class session, you may not want students to write in their documents.

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Practice 1 - Inactivate records, display a record's movement history, and delete records.

INSTRUCTIONS: You have approximately 10 minutes to complete this practice.

Scenario 1a: *Create a new volume of the patient's record for a JAG investigation. Then inactivate that record.*

Access the Create a Label/Record/Volume option.

Create a new record.

Do not print labels or routing/charge cards.

Note: Remember to jot down the system generated record number. You will use it to inactivate, reactivate, and delete records.

Access the Inactive/Reactivate Records option.

Inactivate the record.

Notify the presenter to verify that the record is inactive.

Scenario 1b: *In order to determine the clinics and physicians who have requested the patient's records, you have been asked to print a history of the record's separate movements.*

Access the Trace Movement History option.

Print a record's movement history to your screen.

Pause when the movement history is displayed and notify the presenter to verify the display.

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Practice 1 (continued)

Scenario 1c: *You need to delete the last volume from the patient's record because the JAG investigation is over. Reactivate, then delete the record.*

Access the Inactivate/Reactivate Records option.

Reactivate the record.

Access the Delete a Record option.

Delete the record.

Notify the presenter to verify that the record is deleted.

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Practice Evaluation Criteria

Practice 1 - Inactivate records, display a record's movement history, and delete records.

Verify that students have created, inactivated, and deleted the record.

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Practice 2 - Generate a Record Tracking Management Report

Scenario: *One of your tasks during this shift is to generate and print a list showing all the records that have been flagged as missing. Generate and print a Missing Records List report.*

Access the Missing Records List (ML) option on the Management Reports Menu

PAD System Menu→ **MRM**→ MA→ ML

Specify the print criteria for this report.

Select HOME LOCATION: MEDICAL RECORDS FILE ROOM// **<Return>**

Earliest Date/Time Record Charged: T-30// **<Return**>

Latest Date/Time Record Charged: T// **<Return**>

Device: **<Return>**

Right Margin: 80// **<Return>**

Notify the presenter to verify that the specified report has been generated and displayed on the terminal screen.

Return to the PAD System Menu.

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Practice 2 - Generate a Record Tracking Management Report.

Verify that the students have generated the specified report and that the report is displayed on the terminal screen.

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Section 3. Master Practice

MASTER PRACTICE GUIDELINES

This Master Practice enables the presenter to verify that you have successfully completed the objectives for this module.

The information you need to complete the Master Practice is supplied in the instructions, scenarios, and associated data cards. Data cards are found in Section 4 of the Student Guide.

You may use any reference materials available in the classroom to complete the Master Practice.

Device identifiers are site-specific, and will be provided by the presenter.

Unless otherwise directed by the presenter, please work alone to complete the Master Practice.

Notify the presenter when directed to do so in the Master Practice. This allows the presenter to verify that you have successfully completed an activity.

Information is only specified for those fields and prompts which require specific data entry. To advance past fields/prompts which are not specified, enter data you know to be correct, or press <Return>.

The components of the Master Practice should be completed in the order in which they are presented.

You have approximately 10 minutes to complete this Master Practice.

> **NOTE TO PRESENTER:** Tell students whether they may write in their Student Guides while performing the practices/Master Practice. If the Student Guides must be used for another class session, you may not want students to write in their documents.

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Scenario 1 - Inactivate and delete a record.

INSTRUCTIONS: No additional instructions are required.

Scenario: *You know that a patient's record is to be used as part of a JAG investigation. Create a record to be used in the investigation. Inactivate the record. Then reactivate and delete that record from the patient's file.*

Create the record.

Inactivate the record.

Reactivate the record.

Delete the record.

Notify the presenter to verify that the record has been deleted.

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Master Practice Evaluation Criteria

Scenario 1 - Inactivate and delete a record.

Verify that the record has been created, inactivated, and deleted. Use the Record Inquiry (RI) option to view each part of the process.

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Section 4. Data Cards

Presenter

Username:	**TRAINING**	Access:	**MRTRT**
Password:		Verify:	**MRTRTV**
Area:	**A**		

PRESENTER'S DEMONSTRATION DATA

All required information is contained in the Module Outline.

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Student 1

Username:	**TRAINING**	Access:	**MRTRTA**
Password:		Verify:	**MRTRTAV**
Area:	**A**		

Practices:

Practice 1 - Inactivate records, display a record's movement history, and delete records.

Patient Name: **PARDEE,BETH**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **CUTLER**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **NOT NEEDED FOR INVESTIGATION**

Practice 2 - Generate a Record Tracking Management Report.

All required information is contained in the practice.

Master Practice:

Scenario 1 - Inactivate and delete a record.

Patient Name: **PARDEE,CHAD**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **DEWITT**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **INVESTIGATION HAS BEEN COMPLETED**

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Student 2

Username:	**TRAINING**	Access:	**MRTRTB**
Password:		Verify:	**MRTRTBV**
Area:	**A**		

Practices:

Practice 1 - Inactivate records, display a record's movement history, and delete records.

Patient Name: **PARDINI,ELLIE**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **IRELAND**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **NOT NEEDED FOR INVESTIGATION**

Practice 2 - Generate a Record Tracking Management Report.

All required information is contained in the practice.

Master Practice:

Scenario 1 - Inactivate and delete a record.

Patient Name: **PARDINI,FRANK**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **KENNER**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **INVESTIGATION HAS BEEN COMPLETED**

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Student 3

Username:	**TRAINING**	Access:	**MRTRTC**
Password:		Verify:	**MRTRTCV**
Area:	**A**		

Practices:

Practice 1 - Inactivate records, display a record's movement history, and delete records.

Patient Name: **PARKER,HELEN**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **KIMBROUGH**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **NOT NEEDED FOR INVESTIGATION**

Practice 2 - Generate a Record Tracking Management Report.

All required information is contained in the practice.

Master Practice:

Scenario 1 - Inactivate and delete a record.

Patient Name: **PARKER,IVAN**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **MALCOLM GROW**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **INVESTIGATION HAS BEEN COMPLETED**

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Student 4

Username:	**TRAINING**	Access:	**MRTRTD**
Password:		Verify:	**MRTRTDV**
Area:	**A**		

Practices:

Practice 1 - Inactivate records, display a record's movement history, and delete records.

Patient Name: **PARNELL,KRISTIN**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **MCDONALD**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **NOT NEEDED FOR INVESTIGATION**

Practice 2 - Generate a Record Tracking Management Report.

All required information is contained in the practice.

Master Practice:

Scenario 1 - Inactivate and delete a record.

Patient Name: **PARNELL,LANCE**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **MONCRIEF**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **INVESTIGATION HAS BEEN COMPLETED**

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Student 5

Username:	**TRAINING**	Access:	**MRTRTE**
Password:		Verify:	**MRTRTEV**
Area:	**A**		

Practices:

Practice 1 - Inactivate records, display a record's movement history, and delete records.

Patient Name: **PARSLEY,NANCY**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **BEAUFORD**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **NOT NEEDED FOR INVESTIGATION**

Practice 2 - Generate a Record Tracking Management Report.

All required information is contained in the practice.

Master Practice:

Scenario 1 - Inactivate and delete a record.

Patient Name: **PARSLEY,OTTO**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **CAMP LEJEUNE**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **INVESTIGATION HAS BEEN COMPLETED**

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Student 6

Username:	**TRAINING**	Access:	**MRTRTF**
Password:		Verify:	**MRTRTFV**
Area:	**A**		

Practices:

Practice 1 - Inactivate records, display a record's movement history, and delete records.

Patient Name: **PARSONS,PAULA**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **NH CHARLESTON**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **NOT NEEDED FOR INVESTIGATION**

Practice 2 - Generate a Record Tracking Management Report.

All required information is contained in the practice.

Master Practice:

Scenario 1 - Inactivate and delete a record.

Patient Name: **PARSONS,RANDY**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **CHERRY POINT**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **INVESTIGATION HAS BEEN COMPLETED**

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Student 7

Username:	**TRAINING**	Access:	**MRTRTG**
Password:		Verify:	**MRTRTGV**
Area:	**A**		

Practices:

Practice 1 - Inactivate records, display a record's movement history, and delete records.

Patient Name: **PARTON,TRACY**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **GROTON**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **NOT NEEDED FOR INVESTIGATION**

Practice 2 - Generate a Record Tracking Management Report.

All required information is contained in the practice.

Master Practice:

Scenario 1 - Inactivate and delete a record.

Patient Name: **PARTON,ANDREW**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **JACKSONVILLE**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **INVESTIGATION HAS BEEN COMPLETED**

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Student 8

Username:	**TRAINING**	Access:	**MRTRTH**
Password:		Verify:	**MRTRTHV**
Area:	**A**		

Practices:

Practice 1 - Inactivate records, display a record's movement history, and delete records.

Patient Name: **PARROT,WENDY**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **PATUXENT**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **NOT NEEDED FOR INVESTIGATION**

Practice 2 - Generate a Record Tracking Management Report.

All required information is contained in the practice.

Master Practice:

Scenario 1 - Inactivate and delete a record.

Patient Name: **PARROT,BRIAN**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **PORTSMOUTH**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **INVESTIGATION HAS BEEN COMPLETED**

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Student 9

Username:	**TRAINING**	Access:	**MRTRTI**
Password:		Verify:	**MRTRTIV**
Area:	**A**		

Practices:

Practice 1 - Inactivate records, display a record's movement history, and delete records.

Patient Name: **PARENT,DIANE**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **ANNAPOLIS**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **NOT NEEDED FOR INVESTIGATION**

Practice 2 - Generate a Record Tracking Management Report.

All required information is contained in the practice.

Master Practice:

Scenario 1 - Inactivate and delete a record.

Patient Name: **PARENT,ERNEST**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **PHILADELPHIA**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **INVESTIGATION HAS BEEN COMPLETED**

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Student 10

Username:	**TRAINING**	Access:	**MRTRTJ**
Password:		Verify:	**MRTRTJV**
Area:	**A**		

Practices:

Practice 1 - Inactivate records, display a record's movement history, and delete records.

Patient Name: **PARRIS,GRACE**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **QUANTICO**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **NOT NEEDED FOR INVESTIGATION**

Practice 2 - Generate a Record Tracking Management Report.

All required information is contained in the practice.

Master Practice:

Scenario 1 - Inactivate and delete a record.

Patient Name: **PARRIS,HAROLD**
New Record Type: **OUTPATIENT**
Movement Type: **INACTIVATE**
Borrower: **BETHESDA**
Transfer Comment: **JAG INVESTIGATION**
Reason for Deletion: **INVESTIGATION HAS BEEN COMPLETED**

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Section 5. Reference Materials

Index

Quick Reference Guide **Page**

Document

CREATE A RECORD

This option allows you to create a record in the Record Tracking system or create additional volumes for existing records.

MENU PATH: PAD → MRM → TM → CV

```
ASK FOR HELP = HELP                SCREEN EXIT = F10
              *** MEDICAL RECORDS TRACKING PROFILE ***
               Personal Data – Privacy Act of 1974 (PL 93-579)
======================================================================

Name:  PARR,ALLAN            (20/101-10-0060)        Birth Date:  19 Dec 1960
Ward:                                         Run Date:  21 Jun 2001@082939
======================================================================
                                                                Phone/
   Record Type    Vol    Current Borrower      Date Charged     Location#

1  OUTPATIENT     V3     MEDICAL RECORDS FI    21 Jun 2001@0828  4567/RM# 271
   FAMILY ADVOCACY)      (ADDAMS,HENRY W)
2  OUTPATIENT     V2     MEDICAL RECORDS FI    21 Jun 2001@0827  4567/RM# 271
3  OUTPATIENT     V1     MEDICAL RECORDS F1    21 Jun 2001@0824  4567/RM# 271
```

```
RECORDS:  PARR,ALAN                                 RT NEW RECORD ASK
======================================================================
PARR,ALLAN                 OUTPATIENT               Vol:  3
======================================================================
Home Location:  MEDICAL RECORDS FILE ROOM
Current Location:  MEDICAL RECORDS FILE ROOM
Associated Borrower:  ADDAMS,HENRY W
Content Descriptor:  FAMILY ADVOCACY
```

Need to know information:

- System either displays existing records or a message that no records exist in Medical Records Tracking and then prompts the user to create a new record or volume.

Additional volumes to Outpatient records only may be created. Inpatient volumes are created for each inpatient episode.

HOME LOCATION: Primary file room location. These locations need to be established in the record tracking system.

CURRENT LOCATION: Used to document that a record is currently checked out to another location (borrower).

SAMPLE BARCODE LABEL (Medical Record/Tracking)**:**

```
                 MEDICAL RECORDS FILE ROOM
                    OUTPATIENT RECORD
_____________________________________________________________

Name:  PARR,ALLAN
SSN:  20/101-10-0060
DOB:  19 Dec 1944                 Sex:  MALE
Pt Category N11:                  Spon Grade/Rnk:  N02
Rec #:  374

 MEDICAL  RECORD



Vol #:  1

  *A2222/12345*
```

MRT **CREATE A RECORD**

TRACE A RECORD'S MOVEMENT HISTORY

This option allows you to track a record's movement, i.e., who checked it out, when, for how long.

MENU PATH: PAD → MRM → IN → TM

This trace shows separate records.

```
                 Movement History for the MEDICAL RECORD
                  Personal Privacy Act of 1974 (PL-93-589)
---------------------------------------------------------------------------
Name:  CARTIER,JOHN        20/455-23-1212     Birth Date:  29 NOV 1957
Ward:  2B                                 Run Date:  16 NOV 2001@16133
---------------------------------------------------------------------------
[Sort:  By record type display order, volume and then date charged]

Date Charged          Vol     Borrower        Type of Movement   # of Days

[OUTPATIENT (V1)]

16 Nov 2001@1428      OUT1    Johnson, Ben    Re-Charge              0
16 Nov 2001@1428      OUT1    Outpatient      Check-In               0
                               File Room
16 Nov 2001@1427      OUT1    Johnson, Ben    Charge-Out             21
17 Aug 2001@115553    OUT1    Outpatient      Initial Creation       70
                              FIle Room
                              (Montana, Ron)

[INPATIENT (V3)]

26 Oct 2001@1437      INP3    Johnson, Ben    Charge-Out             21
12 Sep 2001@1046      INP3    Inpatient       Initial Creation       44
                              File Room
```

Need to know information:

- Can sort the records:

  Mixed - shows complete chronological listing of all record movements associated with the patient.

  Separate - shows the chronological listing of all record movements by record type/volume.

  Name of borrower in parenthesis indicates an associated borrower.

Note: The other options within the Record Information Menu display record data in varying format and detail.

MRT TRACE A RECORD'S MOVEMENT HISTORY

CREATE LIST FOR RECORD TRANSFER/RETIRE

This option is the first option used in the record Transfer/Retire process. The data entered establishes the sort criteria and creates a list of those records eligible to be transferred or retired.

MENU PATH: PAD → MRM → FE → CL

```
File Room:  MEDICAL RECORDS ROOM        RETIRE/TRANSFER/LIST CREATE

Retire/Transfer List Parameters                    Date:  17 Nov 2001
--------------------------------------------------------------------------
Movement Activity:  MOVE TO ANOTHER FILE AREA
Type of Record:  OUTPATIENT
Destination:  [FILE ROOM NAME]

Last Activity Method:  INDIVIDUAL'S RECORD
Last Activity Date:  17 Nov 2000
Patient Category:  ACTIVE

Sort Restriction:  ALPHA                                From:  AA
                                                          To:  JZ
```

Need to know information:

Movement Activity: Inactive Records (1)
Move to Another File Area (2)

(1) For those records which are being retired.

(2) For those records which have not been accessed for a specified period of time, but which may be needed at some future date.

Note: Once a record is inactivated, it cannot be accessed unless it is reactivated (See Inactivate/Re-activate option of the Transaction Menu).

- Type of Record: Outpatient, Inpatient, etc.
- Destination: Indicates where the records will be located when the transfer/retire process is completed using the Process a Transfer/Retire List option.
- Last Activity Method: Identifies the type of last activity required to be eligible for selection.

  0 = Individual's Record
  1 = FMP Group
  2 = Last Discharge
- Patient Category: Restricts selection criteria to a specific patient category.

  A = Active Duty
  D = Family Members/Retirees
  E = All
  O = Other
- Sort Restriction: Determines how records are sorted and puts a limit on the sort, e.g., only patients whose last name begins with A thru J.

  0 = Terminal Digit
  1 = Alpha

MRT **CREATE LIST FOR RECORD TRANSFER/RETIRE**

PRINT A TRANSFER/RETIRE LIST

This option allows you to print a list of records identified for transfer to another record room in the facility or for retirement/salvage.

MENU PATH: PAD → MRM → FE → LI

Choose from:

Inpatient File Room	09-28-01	Move to another file room area	Inpatient
Inpatient File Room	09-28-01	Inactivate Record	Inpatient
Outpatient File Room	08-21-01	Inactivate Record	---

Transfer/Retire Listing   Printed: 16 NOV 2001@095157

Division: [DIVISION]   Destination: HOLDING RECORD ROOM
File Room: OUTPATIENT FILE ROOM   Record Type: OUTPATIENT
Movement Activity: TRANSFER TO ANOTHER FILE ROOM

Personal Data – Privacy Act of 1974 (PL-93-579)

FMP/SSN	**Patient Name**	**Patient Category**	**Last Activity**
20/344-67-5656	Avery, Fowler	USN Active Duty	17 Aug 2001
20/807-55-0505	Damrt, Test01	USA AD Officer	17 Aug 2001
20/533-80-0056	Eager7, Test	USAF Active Duty	17 Aug 2001
20/447-32-8985	MSA, ADTADM	USA AD Officer	17 Aug 2001

Need to know information:

- Select transfer/retire list to print:
  1. Enter record room for which the list was created.
  2. Enter date of applicable list.

  Note: There may be more than one list for a specific record room and date due to differences in selected criteria and movement activity.
- Can print the list as sorted alphabetically or by terminal digit.
- Can use the printed list to:
  1. Verify list prior to processing.
  2. Maintain a copy of records processed.
  3. Enclose with records being retired.

MRT **PRINT A TRANSFER/RETIRE LIST**

PROCESS A TRANSFER/RETIRE LIST

This option allows you to process a list of records that are identified for transfer to another record room in the facility or for retirement.

MENU PATH: PAD → MRM → FE → PR

```
Choose from:

Inpatient File Room      09-28-01    Move to another       Inpatient
                                           file room area
Inpatient File Room      09-28-01    Inactivate Record     Inpatient
Outpatient File Room     08-21-01    Inactivate Record        ---
```

```
Medical Records Tracking                          User:  CASEY,BEN
Outpatient File Room                              Created:  09 NOV 2001
=======================================================================
Movement Activity:  MOVE TO ANOTHER FILE AREA
Type of Record:  OUTPATIENT
Destination:  [HOLDING RECORD ROOM]

Last Activity Method:  INDIVIDUAL'S RECORD
Last Activity Date:  08 Nov 2001
Patient Category:  ACTIVE

Sort Restriction:  ALPHA                          From:  AA
                                                    To:  JZ

NOTE:  This option will process all records included in the selected batch. Is this the correct
batch?  NO///
```

Need to know information:

- Select transfer/retire list to edit:
  1. Enter record room for which the list was created.
  2. Enter date of applicable list.

  Note: There may be more than one list for a specific record room and date due to differences in selected criteria and movement activity.
- The system displays the criteria selected for this list and prompts for verification that this is the correct batch to process.

MRT PROCESS A TRANSFER/RETIRE LIST

EDIT A TRANSFER/RETIRE LIST

This option allows you to delete entries from the list of records that are identified for transfer to another record room in the facility or for retirement.

MENU PATH: PAD ➔ MRM ➔ FE ➔ EL

```
Choose from:

Inpatient File Room      09-28-01    Move to another       Inpatient
                                        file room area
Inpatient File Room      09-28-01    Inactivate Record     Inpatient
Outpatient File Room     08-21-01    Inactivate Record       ---

Select Record Transfer-Retire List Name:
```

```
                   *** EDIT TRANSFER/RETIRE LIST ***

Medical Records Tracking                    Record:    OUTPATIENT
Outpatient File Room                        Created:   09 NOV 2001
Destination:  [HOLDING RECORD ROOM]         Activity:  MOVE TO ANOTHER
                                                         FILE AREA

               Personal Data – Privacy Act of 1974 (PL-93-579)
--------------------------------------------------------------------------
FMP/SSN           Patient Name        Vol.       Last Activity

20/411-11-1111    Graves, Harold       1         07 Nov 2001@1300
--------------------------------------------------------------------------
20/435-56-7634    Guajardo, Robert     1         14 Aug 2001@155447
--------------------------------------------------------------------------
01/555-66-4444    Haan, Mary           1         05 Nov 2001@1333
```

Need to know information:

- Select transfer/retire list to edit:
  1. Enter record room for which the list was created.
  2. Enter date of applicable list.
- Select records to be deleted from list.

Note: There may be more than one list for a specific record room and date due to differences in selected criteria and movement activity.

MRT EDIT A TRANSFER/RETIRE LIST

DELETE A TRANSFER/RETIRE LIST

This option allows you to delete a list of records from the system that are identified for transfer or retirement. This option is used most appropriately after processing of a list is complete or when a Transfer/Retire list is created in error.

MENU PATH: PHD → MRM → FE → DL

```
Choose from:

Inpatient File Room      09-28-01    Move to another        Inpatient
                                        file room area
Inpatient File Room      09-28-01    Inactivate Record      Inpatient
Outpatient File Room     08-21-01    Inactivate Record        ---
```

```
Medical Records Room                                  User:  CASEY,BEN
OutPatient File Room                               Created:  21 AUG 2001
=====================================================================
Movement Activity:  INACTIVE RECORD
Type of Record:  OUTPATIENT
Destination:  [HOLDING RECORD ROOM]

Last Activity Method:  INDIVIDUAL'S RECORD
Days of Inactivity:  365
Patient Category:  ACTIVE

Sort Restriction:  ALPHA                              From:  AA
                                                        To:  JZ

Are you sure you want to delete this list?  NO//
```

Need to know information:

- Select transfer/retire list to delete.
  1. Enter record room for which the list was created.
  2. Enter date of applicable list.

Note: There may be more than one list for a specific record room and date due to differences in selected criteria and movement activity.

- The system displays criteria selected and prompt for verification that this is the list to delete.

MRT DELETE A TRANSFER/RETIRE LIST

FILE ROOM SET-UP

This is the first of the primary System Definition Menu options used to set up a specified record tracking application.

This option allows you to enter and update parameters for the file rooms and associate them with the correct institution.

MENU PATH: PAD → MRM → SD → FSU → File Room Name

```
Borrowers/file Areas:  OUTPATIENT FILE ROOM                    RT FILE
                                                               ROOM SET-UP
Phone Number:  4571
Location/Room Number:  RM 271
Record Sort:  TERMINAL DIGITS
Action if Home is Different:  QUESTION USER ABOUT CHANGE
Default Record Master Type:  [IMAGE TRACKING APPLICATION ONLY]
Volumes Required:  LAST VOLUME

                    *Printers Assigned to this File Room*
Record Barcode Printer:  [DEVICE]
Request Notice Printer:  [DEVICE]
Management Report Printer:  [DEVICE]
Change Card Printer:  [DEVICE]
Pull List Printer:  [DEVICE]

                  *Security Key Needed to Select File Room*
Which Security Key Is Needed?:  R+FR1
```

Need to know information:

- **PRINTERS ASSIGNED TO THE FILE ROOM:** Entries become the default printer on which the specified pull product is printed; entries must be printers from the Device file.
- **SECURITY KEY NEEDED TO SELECT FILE ROOM:** Entering a Security Key limits access to the record traking records in this record room to the Security Key holder.

MRT FILE ROOM SET-UP

LABEL FORMATTER

This is the second of the primary System Definition Menu options used to set up a specified record tracking application.

This option allows you to design barcode label formats to specify the information you wish to appear on the labels, as well as the label location at which the data appears. You may also edit label formats using this option.

MENU PATH: PAD → MRM → SD → LFM → LF → Label Format Name

LABEL FORMAT: Borrower standard

```
ASK FOR HELP = HELP    SCREEN EXIT = F10

<<<<<----------------------------------------------Column No. ---------------------------------------------->>>>>

0 ------------1--------------2--------------3-------------4-------------5--------------6-------------7-------------8
1             0              0              0             0             0              0             0

   Name:  DOE,JANE

   Phone #:  444-3333

   Location:  RM  456-D

*A2222/12345*

   PRINTED:  AUG 6, 2001

Edit this format ? YES//
```

Need to know information:

- **PRINT FIELDS:** Field entries are allowed for fields that can be printed for the entered label type only, e.g., borrower's field in Borrower Label.
- **ROW/COLUMN:** Entries determine the location on which the print field data will appear.

MRT **LABEL FORMATTER**

TYPE OF RECORD SET-UP

This is the third of the primary System Definition Menu options used to set up a specified record tracking application.

This option allows you to enter Record Types and define the parameters associated with the record tracking application.

MENU PATH: MRM ➔ SD ➔ TYS ➔ Record Type Name

```
Record Types:  OUTPATIENT                         RT TYPE SET-UP

Name:  MASTER FOLDER                              Abbreviation:  OUT
Can Record Be Requested?:  YES                    Is Record Temporary?:  NO
Ask For Content Descriptor?:  YES
Master Folder:  [IMAGE TRACKING APPLICATION ONLY]
Multiple Volumes Allowed?:  YES
Description:  OUTPATIENT RECORD TYPE

Inquiry Display Order:  1                     Inactivation Date:

                    * Label Format Specifications *

Record Label Format:  OUTPATIENT STANDARD LABEL
Request Notice Format:  CHART REQUEST NOTICE
```

```
Record Types:  OUTPATIENT                         RT TYPE SET-UP — CONT

                    * Cutoff/Purge Parameters *

Pending Request Cutoff (Days):  5
Overdue Record Cutoff (Days):  1
Current Borrower Future Request Time Minimum (minutes):
#Previous Movements to Retain:  10
Request Purge Cutoff (Days):  7
OK to Purge Data?:  YES

                    * Missing Record Control Parameters *
Control of Finding Records:  [ANY USER]
```

```
Record Types:  OUTPATIENT                         RT TYPE SET-UP  — CONT

                         * Other Records to Create When *
                         * Initializing the *
Linked Records:

Allowable File Rooms:
                         MEDICAL RECORDS FILE ROOM
```

Need to know information:

- **INQUIRY DISPLAY ORDER:** Enter the numeric order in which this record will appear on the Patient Record Inquiry.
- **LABEL FORMAT SPECIFICATIONS:** Enter label names associated with this Application. Labels must be created using Label Formatter option before they may be entered here.
- **MISSING RECORD CONTROL PARAMETERS:** Enter the users able to remove MISSING record flags from this Record Type. If the field is set to FILE ROOM SUPERVISOR ONLY, no other users may process the missing record until a user holding a Supervisor Security Key removes the flag. If set to ANY USER, any user may remove the flag and process the record, but the flag removal is subject to supervisor approval.
- **ALLOWABLE FILE ROOMS:** Enter any and all File Room(s) which may store this Record Type. The system allows only file rooms associated with the same application as the Record Type; e.g., OUTPATIENT with Medical Records Application. File Rooms must be defined using the File Room Set-Up option before they may be entered here.

APPLICATION SET-UP

This is the fourth of the primary System Definition Menu options used to set up a specified record tracking application.

This option allows you to enter and edit parameters specific to the Record Tracking Application. Prior to defining the parameters, they must first be defined in the options File Room Set-Up, Label Formatter, and Type of Records Set-Up.

MENU PATH: MRM ➔ SD ➔ APP

```
RECORD TRACKING APPLICATION:  MEDICAL RECORDS TR
                                                      RT APPL SET-UP — CONT

          * Application Parameter Set-Up for Medical Records Tracking *

Service:
Synonyms:
MAS
MRT
                              * Division Parameters *
Division:
DIV A - TRAINING HOSPITAL


ASK FOR HELP = HELP                  SCREEN EXIT = F10
RECORD TRACKING APPLICATION:  MEDICAL RECORDS TR  RT  APPL  SET-UP -- CONT
```

```
DIVISION:  DIV A - TRAINING HOSPITAL                  RT APPL SET-UP — CONT

Division:  DIV A - TRAINING HOSPITAL
Central File Area:  MEDICAL RECORDS FILE ROOM
Default Pull List Sort:  TERMINAL DIGITS
Folder Pull Method:
Print Pull Notice:


ASK FOR HELP = HELP                  SCREEN EXIT = F10
```

```
DIVISION:  DIV A - TRAINING HOSPITAL                  RT APPL SET-UP — CONT

          *Record Type Parameters Within DIV A - TRAINING HOSPITAL*
Type of Records:
INPATIENT
OUTPATIENT



ASK FOR HELP = HELP                  SCREEN EXIT = F10
```

```
                         Miscellaneous Parameters*

Profile/Report Reader:  MEDICAL RECORD
Entity Select Prompt:  Select PATIENT:
Entity Display Header:  Patient Name
Record Prompt:  RECORD

Default Record Creation Type:  OUTPATIENT
Borrower Barcode Format:  BORROWER STANDARD

File Room Supervisor Key:  RT MRT-FR-SUPER
File Room Staff Key:  RT MRT-FR-STAFF

Deleted Record Mail Group:  RT DELETE
Missing Record Mail Group:  RT MISSING
```

MRT **APPLICATION SET-UP**

APPLICATION SET-UP (continued)

```
ASK FOR HELP = HELP                 SCREEN EXIT = F10
RECORD TRACKING APPLICATION:  MEDICAL RECORDS TR
                                             RT APPL SET-UP — CONT

                         *Borrower Parameters*

Borrower File Parameters:
HOSPITAL LOCATION
MEDICAL CENTER DIVISION
MEDICAL TREATMENT FACILITY
PROVIDER
+RT FILE ROOM SPECIFIC LOCATIONS FILE



ASK FOR HELP = HELP                 SCREEN EXIT = F10
```

```
BORROWER FILE PARAMETERS:  HOSPITAL LOCATION
                                             RT APPL SET-UP — CONT

  Borrower File:  HOSPITAL LOCATION
  Ask Phone/Room?:  NO
  Ask for Associated Borrower?:  NO
  Show Charged Records?:  YES
```

Need to know information:

- **DIVISION:** Enter any division associated with this MTF.
- **CENTRAL FILE AREA:** Enter the File Room associated with this division and application that will serve as the default file room displayed when accessing this application. (See File Room Set-Up in the Quick Reference Guide.)
- **FOLDER PULL METHOD** (Image Tracking Application only).
- **PRINT PULL NOTICE** (Image Tracking Application only).
- **TYPE OF RECORDS:** Enter Record Types(s) associated with this division and this application. (See Type of Record Set-Up in the Quick Reference Guide.)
- **DEFAULT HOME LOCATION:** You must enter the File Room associated with this division so that the system is able to assign the record when it is initially created.
- **DEFAULT INITIAL BORROWER:** Enter the borrower/location associated with this application that the system is to automatically charge a record to when it is initially created.
- **CHARGE/ROUTING TAG FORMAT:** Enter label names associated with this application. Labels must be created using Label Formatter option before they may be entered here.
- **MISCELLANEOUS PARAMETERS:** Enter Prompt and Report Titles.
- **FILE ROOM SUPERVISOR/STAFF KEY:** Enter security keys associated with this application.
- **DELETED/MISSING RECORD MAIL GROUP:** Enter mail group names used to generate mail bulletins informing user of deleted/missing records.
- **BORROWER FILE PARAMETERS:** Enter file entities that are to have borrower privileges. (See Borrower Set-Up in the Quick Reference Guide.)

MRT **APPLICATION SET-UP**

BORROWER SET-UP

This is the fifth of the primary System Definition Menu options used to set up a specified record tracking application.

This option allows you to enter and update parameters of specific borrowers.

MENU PATH: MRM → SD → BSU → Borrower

```
BORROWERS-FILE AREAS:  ORTHOPEDIC CLINIC            RT BORROWER SET-UP

Location/Room Number:  A-1844                 Phone Number:  535-2994
Borrowing Privileges:  NORMAL
Synonyms:
AORTHO
ORTHOPEDIC CLINIC

=======================================================================

          *Barcode Printer to be Used When Arriving Radiology Exams*
Barcode Printer:


          *Record Request to be Made When Making an Appointment*
                        *or Registering a Patient*

Record Type Needed:
OUTPATIENT


ASK FOR HELP = HELP                SCREEN EXIT = F10
```

Need to know information:

- **BORROWER PRIVILEGES:** Enter (N)ormal, (I)nactivated, or (R)evoked.
- **RECORD TYPE NEEDED:** Enter Record Type needed by this borrower when an appointment is made, or when a patient is registered.
- Type must be entered here if the clinic wants to use the Batch/Pull List. For example, an appointment in the Cardiac Clinic triggers a request for the patient's chest subfolder.
- Prior to setting up a location or a provider as a borrower, verify that the prospective borrower is in one of these files:

  HOSPITAL LOCATION
  PROVIDER
  MEDICAL CENTER DIVISION
  MEDICAL TREATMENT FACILITY
  RT FILE ROOM SPECIFIC LOCATION FILE

MRT **BORROWER SET-UP**

Sample: Transfer/Retire Listing

Printed: 21 Jun 2001@1344 Page: 1

Division: DIV A - TRAINING HOSPITAL | Movement Activity: MOVE TO ANOTHER FILE AREA | Record Type: OUTPATIENT
Fileroom: MEDICAL RECORDS FILE ROOM | Last Activity Method: INDIVIDUAL'S RECORD | Sort Restriction: TERMINAL DIGIT
Destination: MEDICAL RECORDS FILE ROOM | Patient Category: ALL CATEGORIES | From:
Date Created: 21 Jun 2001@1216 | Activity Cutoff: 21 Jun 2000 | To :

==

Personal Data - Privacy Act of 1974 (PL-93-579)

FMP/SSN	Patient Name	Patient Category		Record Type/Volume	Last Date of Activity
20/700-70-6902	JAMESON,EARL E	A11	USA ACTIVE DUTY OFFICER	OUTPATIENT (V1)	17 Mar 2000
01/600-60-7002	SAWYER,FRED	F41	USAF FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999
30/600-60-7002	SAWYER,FLOYD	F41	USAF FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999
20/700-70-7002	JAMESON,FLORENCE F	F11	USAF ACTIVE DUTY	OUTPATIENT (V1)	17 Mar 2000
01/600-60-7102	SAWYER,GEORGIA	A41	USA FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999
30/600-60-7102	SAWYER,GINA	A41	USA FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999
20/700-70-7102	JAMESON,GEORGE G	A11	USA ACTIVE DUTY OFFICER	OUTPATIENT (V1)	17 Mar 2000
01/600-60-7202	SAWYER,HANK	N41	USN FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999
30/600-60-7202	SAWYER,HAROLD	N41	USN FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999
20/700-70-7202	JAMESON,HOLLEY H	N11	USN ACTIVE DUTY	OUTPATIENT (V1)	17 Mar 2000
01/600-60-7302	SAWYER,ISRAEL	A41	USA FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999
30/600-60-7302	SAWYER,IONA	A41	USA FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999
20/700-70-7302	JAMESON,IAN I	A11	USA ACTIVE DUTY OFFICER	OUTPATIENT (V1)	17 Mar 2000
01/600-60-7402	SAWYER,JOE	F41	USAF FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999
30/600-60-7402	SAWYER,JOHN	F41	USAF FAM MBR AD	OUTPATIENT (V1)	17 Mar 2000
01/600-60-7502	SAWYER,KIMBERLY	A41	USA FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999
30/600-60-7502	SAWYER,KAREN	A41	USA FAM MBR AD	OUTPATIENT (V1)	17 Mar 2000
01/600-60-7602	SAWYER,LEO	N41	USN FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999
30/600-60-7602	SAWYER,LANCE	N41	USN FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999
20/700-70-7602	JAMESON,LINDA L	N11	USN ACTIVE DUTY	OUTPATIENT (V1)	17 Mar 2000
01/600-60-7702	SAWYER,MICHAEL	A41	USA FAM MBR AD	OUTPATIENT (V1)	21 Nov 1999

Sample: Missing Records List Report

DIV A - TRAINING Printed: 21 Jun 2001@1624 Page 1

MISSING RECORDS REPORT
[Home Location: MEDICAL RECORDS FILE ROOM] [Sorted by: TERMINAL DIGITS]
Personal Data - Privacy Act of 1974 (PL-93-579)
From 22 May 2001 to 21 Jun 2001

FMP/SSN	Patient Name	Type	Status	Borrower History	Charged	Associate Borrower
20/101-10-0060	PARR,ALLAN	OUT1	MISSING	MEDICAL RECORDS FILE	21 Jun 2001@1616 21 Jun 2001@1617	

Entered as missing: 21 Jun 2001@1617 Entered by: TRAINING MANAGER
Supervisor Comment: Last seen in Coding.
User Comment:

*** End of Report ***

MRT MANAGEMENT REPORTS MATRIX

Report	Print (S)ingle Location (D)ivision	Default User Current Location	Access All Home Locations w/i Division	(S)ingle Room Report (M)ultiple Room
Ad Hoc Request Response Statistics report	S	N/A	N/A	S
Charged Records By Home Location	S	N/A	S	S
Loose Filing Report	S	X	X	M
Missing Records List	S	X	X	S
Overdue Records List	D/S	X	X	S
Pending Request List	S	X	X	S
Records Charged to a Borrower	D/S	N/A	N/A	N/A

PAD-00933

PAD: RECORD TRACKING

Module 3 - Advanced Record Room Functions

Section 6. Transparencies

There are no transparencies for this module.

PAD:
RECORD TRACKING

Appendix A
Class Evaluation Forms